

California Integrated Service Delivery Evaluation Report

Phase I

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By
Richard W. Moore, Ph.D.
Gerard Rossy, Ph.D.
William Roberts, Ph.D.
Kenneth Chapman Ph.D.
Urte Sanchez MBA
Chris Hanley

The College of Business and Economics

California State University
Northridge

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Executive Summary

Overview

In January 2010 the California Workforce Investment Board (CWIB) contracted with researchers at California State University, Northridge to evaluate the “Integrated Service Delivery” (ISD) initiative. This initiative was designed to integrate the work of local Workforce Investment Act Programs with Wagner-Peyser programs inside California OneStops. At the time this study began 12 local WIA areas had joined the program and integrated their programs in the 2008-09 program year. The sites, which were called “Learning Labs”, were halfway through their second year of operation as ISD sites when our work began.¹ Our evaluation project has two phases. In Phase I a formative evaluation of the program examines the implementation of ISD, and in Phase II a summative evaluation of the program will measure ISD’s impact. This report provides the results of the formative evaluation which consisted of in-depth case studies of four ISD sites or Learning Labs.

To guide our work in the formative evaluation we developed, in consultation with our advisory committee, six evaluation questions.

1. How did the process of service integration proceed? How did the experience vary from site to site and how did the process vary from the planned process?
2. What specific methods and activities contributed most to successful integration?
3. What barriers and challenges emerged in the process and how were they overcome?
4. How were the broad goals of the program operationalized at the local level?
5. What data are available at the local and state level to measure the achievement of service integration’s goals?
6. What lessons have been learned that would help other local areas implement service integration?

In this report we use our analysis of these four diverse Learning Labs to answer these questions and to provide insights about the ISD program.

Findings

We studied four OneStops in some depth. This allows us to examine their experience in detail, but it does not provide a large enough sample to generalize to the entire population of ISD sites. It does allow us to identify factors that emerged across the four sites that seem to either support or hinder the implementation of ISD. Based on this analysis we have identified a series of “critical success factors” that appear to us to influence the success of ISD implementation and give us some evidence to suggest strategies that help other OneStops implement ISD.

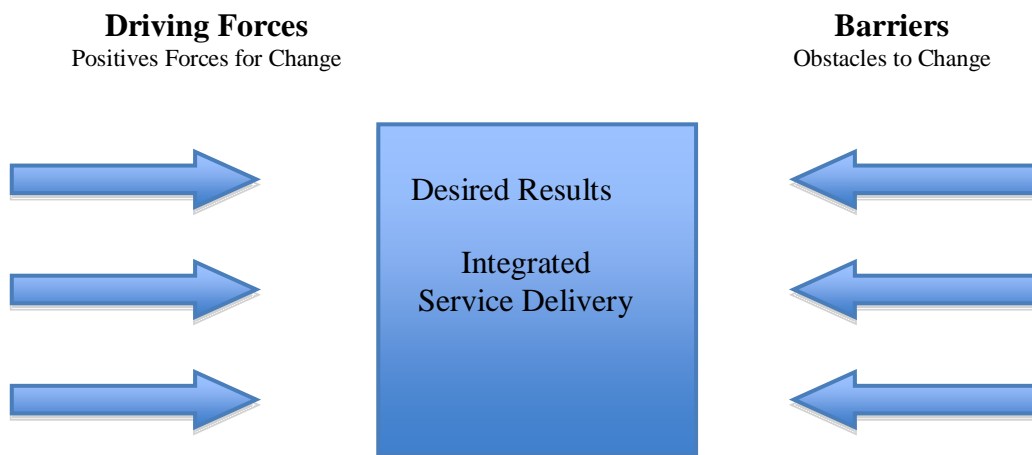
The critical success factors (CSFs) we identified fall into two categories; the OneStop’s context and the implementation process. Within the two categories are five critical success factors, which are listed below:

¹ Two other local areas became ISD sites in the 2009-10 program year as well.

- Context
 - Organizational Culture and Political Context
 - Local and Regional Context
- Implementation and Process
 - Management Structure
 - Decision-making Processes
 - Formal and Informal Implementation Strategies

Each critical factor can be viewed as having both a *driving* force—one that promotes the desired change—and a *barrier*— that inhibits the desired change. This model of change or strategy implementation was first proposed by Kurt Lewin² to provide a way of conceptualizing the critical factors affecting change management in organizational settings.

Figure E-1: Lewin's Driving Forces and Barriers



The key to effective change is to design strategies and processes that enhance and support the driving forces and diminish or remove the barriers to change. Next we summarize the driving forces and barriers for each critical success factor.

Context

Organizational Culture and Political Context

The drivers of, and barriers to, integration resulting from organizational culture and political factors are summarized as follows

² Lewin K. (1943). Defining the "Field at a Given Time." *Psychological Review*. 50: 292-310. Republished in *Resolving Social Conflicts & Field Theory in Social Science*, Washington, D.C.: American Psychological Association, 1997.

<u>Drivers</u>	<u>Barriers</u>
<ul style="list-style-type: none"> • Shared mission and vision • Common goals and measures • Common values and priorities • Shared commitment to customers • Compatible data systems 	<ul style="list-style-type: none"> • Different sense of mission and purpose • EDD and WIA held accountable to different goals and measures • Different data system

Local and Regional Context

The local setting and its history appeared to be one of the factors that influenced the implementation of ISD. When the WIA and EDD organizations had a history of cooperation and mutual support, implementation proceeded more quickly and more smoothly probably reflecting a higher level of trust and experience cooperating and sharing responsibilities.

The drivers of, and barriers to, integration resulting from local contextual factors can be summarized as follows:

<u>Drivers</u>	<u>Barriers</u>
<ul style="list-style-type: none"> • History of cooperation • Good working relationship between EDD and WIA management • Full-time EDD senior manager on site • High level of trust between WIA and EDD staff • Shared management philosophy of senior management • Symmetry in size and budget • Common shared space 	<ul style="list-style-type: none"> • History of conflict between EDD and WIA organizations • Poor relationship between EDD and WIA management (or no relationship) • Senior EDD manager on site part time only • Competitive rather than cooperative management philosophies • Significant asymmetry in budget or personnel • Physical barriers in the work space

Implementation and Process Factors

Management Structure

The drivers of, and barriers to, integration resulting from issues related to management structure are summarized as follows:

<u>Drivers</u>	<u>Barriers</u>
<ul style="list-style-type: none">• An ongoing strategic planning process• A clear well articulated vision• Shared goals by all staff• Effective functional management• Shared management responsibility• Compatible data systems	<ul style="list-style-type: none">• Lack of strategic planning• Poorly defined, or no vision• Conflicting goals or no goals• Conflicting management priorities• Incompatible data systems

Decision-making Processes

The drivers of, and barriers to, integration resulting from the local decision making processes are summarized as follows:

<u>Drivers</u>	<u>Barriers</u>
<ul style="list-style-type: none">• WIA and EDD staff involvement in decision to adopt ISD• Collaborative decision making between WIA and EDD staff and management in the initial design• Clear goals and measures (SMART goals)• Ongoing collaboration and participation by all staff beyond initial implementation• Joint problem solving	<ul style="list-style-type: none">• Failure to involve all EDD and WIA staff in the decision to adopt ISD• Poor communication and collaboration between EDD and WIA staff during and after implementation• Vague general goals such as “increase enrollments” without specific measures of success• Failure to see problems as being “shared problems” requiring joint problem solving by both partners

Formal and Informal Implementation Strategies

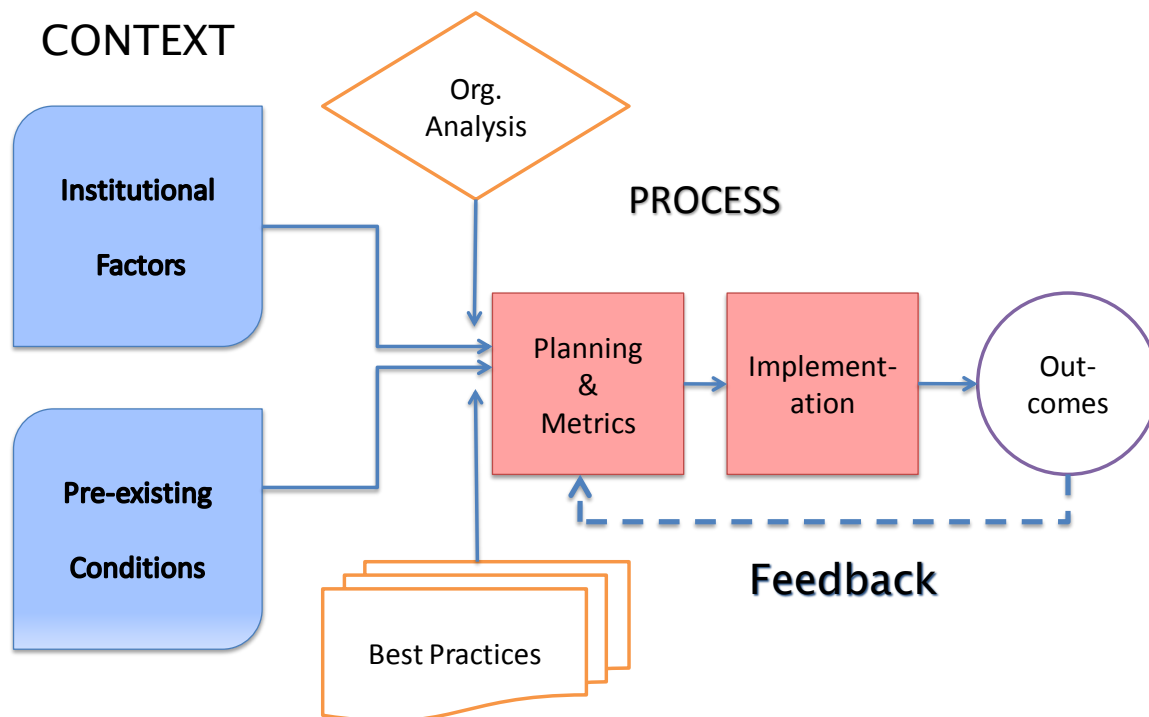
The drivers of, and barriers to, integration resulting from implementation strategies can be summarized as follows:

<u>Drivers</u>	<u>Barriers</u>
<ul style="list-style-type: none">• Team building prior to implementation• Ongoing data collection on measures of effectiveness• Physical integration of the Onestop layout• Symbolic integration through titles and logos.• Providing opportunities for social interaction among staff and management	<ul style="list-style-type: none">• Failure to prepare staff for the implementation of ISD• Lack of data feedback on results from the integration process• Not reinforcing the change process after implementation• Lack of social interaction between EDD and WIA staff

Seeing ISD as A System

Looking back overall our four case studies we see that ISD implementation is a system. The graphic below shows how all the elements discussed fit together into a systems view of ISD. Going from left to right you can see that the context comes first. A local area can begin the ISD process by analyzing it's local context based on the specific factors mentioned above. Next, the local area can review best practices from more established ISD sites. With this analysis complete the local area can engage in planning and set specific measurable goals related to their local context. The next step is the big one, the implementation of ISD. Again, our previous analysis suggests a number of factors that support and constrain a successful implementation. After implementation progress needs to be measured against the goals, and the results fed back into the system to make the needed adjustments.

Figure E-2: ISD A Systems View



Final Thoughts

Management guru Peter Senge says that “Profound Change” is an organizational change that combines “inner shifts in people’s values, aspirations and behaviors with outer shifts in processes, strategies, practices and systems”. We see ISD as a profound change for the workforce system. Both EDD and WIA staff and managers have to change how they see themselves, their jobs, their organizations and their clients in order to change the systems, practices and strategies that make up workforce programs. This is a huge challenge in normal times, and an even larger one in the chaotic context created by the recession and stimulus funding. We were impressed throughout our field work by the commitment and dedication of the people working in the OneStops we studied. We hope that this analysis of the four case study sites will contribute to the continued improvement of the California workforce system.

I Introduction

Introduction

In January 2010 the California Workforce Investment Board (CWIB) contracted with researchers at California State University, Northridge to evaluate the “Integrated Service Delivery” (ISD) initiative. This initiative was designed to integrate the work of local Workforce Investment Act Programs with Wagner-Peyser programs inside California OneStops. At the time this study began 12 local WIA areas had joined the program and integrated their programs in the 2008-09. The sites, which were called “Learning Labs”, were halfway through their second year of operation as ISD sites when our work began.³ Our evaluation project has two phases. In Phase I a formative evaluation of the program examines the implementation of ISD, and in Phase II a summative evaluation of the program will measure ISD’s impact. This report provides the results of the formative evaluation which consisted of in-depth case studies of four ISD sites or Learning Labs.

Formative evaluations are not designed to judge the effectiveness of a program. Rather, the evaluations collect objective data on the implementation of a program, to provide prompt feedback to program operators about their work, identify best practices as well as bottlenecks and barriers to successful implementation. In short, formative evaluations document implementation to improve current implementation and capture lessons learned for future implementation efforts. In this report, we begin with a brief overview of the purpose and design of the Integrated Service Delivery Initiative. Then we describe our evaluation approach. This is followed by four detailed case study reports. In a separate chapter we review issues with data systems related to the initiative. Finally, we conclude with our analysis of the lessons learned from the four cases, which we frame as “critical success factors” and “barriers to success” that emerged in the cases.

The WIA Experience and ISD

The original vision for the Workforce Investment Act (WIA) was to create a program that would be more effective than the traditional “training and job placement” model (King, 2004). The WIA program created “OneStop Career Centers” where—in theory—all key programs to assist the unemployed, such as WIA, Job Service, local educational agencies, would be located together, ideally under one roof. These OneStops are governed by local area Workforce Investment Boards (WIBs), with each WIB having one or more OneStops in its area. OneStop Centers offer “universal access” services so that anyone can come in and access resources such as job listings, as well as computers and printers for producing resumes and other services. Further, the OneStops typically maintain contacts with local employers, and can link potential employees with employers who are hiring. People who meet eligibility criteria and are formally registered in the WIA program can receive three levels of additional service:

- Core services—essentially job search assistance—which mainly consists of access to information to help participants find jobs quickly with minimal staff help.

³ Two other local areas became ISD sites in the 2009-10 program year as well.

- Intensive services, in which professional staff provide counseling, skills assessment, and some support services such as child care or transportation subsidies for clients.
- Training services—mostly provided through a voucher system called Individual Training Accounts (ITAs)—where participants get traditional skills training and general education. On-the-job (OJT) training may also be provided (O’Leary, Straits, & Wandner, 2004). The idea was that all participants first try to find a job on their own, and if that was not successful they would then be enrolled in WIA and provided staff assistance and more intensive resources. This is the “work-first” model in practice. Then, only as a last resort would formal training or OJT be provided.

A key feature of the program that emerged is that the vast majority of people would be served through Universal Services which did not require local areas to enroll the client in WIA or to be responsible for what happened to them after service. This created a system where there were, at the state level at least, no complete records- not even a count- of people served by the WIA system. For example, in 2007-08 the City of Los Angeles local area served 139,314 universal access clients but only enrolled 4,701 formally in WIA. At the state level the number of universal access clients was not reported, so the system lacked even a simple count of the number of people served.

Universal access services also were a significant cost item. According to a detailed study of costs at 22 California OneStops universal services consumed about one-third of total costs (Moore et.al. 2007).

Many critics of WIA complained that WIA was not training people and developing skills for long run success in the labor market but just moving people from one low paying job to another. Critics contended that the new system has led to creaming, in that only the more-able participants are enrolled, in order to boost performance of the federal performance measures which included placement rates and earnings after service. Critics also contend that training opportunities, especially for the most disadvantaged, have declined under WIA. An analysis by Baider (2008) contends that the percentage of adult participants getting training has declined, and the percentage of disadvantaged adults getting training has declined severely. Frank and Minoff (2005) report that the percentage of low-income participants getting training fell from 96% in the last year of JTPA to only 68% in 2003–2004 WIA program year. The General Accounting Office (GAO) has also criticized the WIA program for its limited investment in training; according to the GAO, only about 40% of WIA funds are invested in training (GAO, 2005). The remaining 60% of WIA funding is spent on activities such as services for employers, case management, and providing resources for self-help assistance in the OneStop.

In response to these critiques and others a national dialogue emerged that focused on how to do more than just get WIA and Wagner-Peyser programs together under one roof, reformers wanted to get the programs to truly work together and provide a higher level of service to more people. Further reformers wanted to “start counting” and to “receive credit” for the many people served by the system who were not now enrolling in the system. It was out this dialogue the idea of an “Integrated Service Delivery” initiative developed for California.

The ISD Design

The ISD initiative was launched with a series of meetings to which local WIA leaders were invited. At the meetings Greg Newton, a consultant who had worked on ISD in New York State, presented his model for integration and answered practical questions about its implementation. After several rounds of discussions a framework for ISD in California emerged. This framework was summarized in a three page document titled *Integrated Service Delivery, California Workforce System, State/Local Partnership: Framework for Implementing Integrated Service Delivery and Learning Labs*. The document was issued jointly by the Employment Development Department (EDD) and the California Workforce Association (CWA), a membership organization representing local WIA programs.

This document describes a “consensus framework for ISD” and is dated July 12, 2007. The document sets out the following goal:

Our goal is that every workforce area in California will eventually implement integrated service delivery. Again, the intent of the Learning Lab experience is to provide sufficient data, uncover issues for resolution and provide a roadmap for expansion to all the State’s LWIAs.

This founding document makes it clear the initiative is an experiment from which the system wants to learn more, but that it is also a reform intended to be implemented state-wide.

The key elements of the reform are described this way:

- *A common pool of customers composed of WIA title I Adults and Dislocated Workers; Wagner-Peyser, veterans, Long- term Unemployed, Migrant Seasonal Farm worker and Trade Adjustment Act.*
- *A common set of services available to all customers in the pool through a common customer flow.*
- *Integrated Staffing: Shared WIA, WPA and TAA staffing of the common service and customer flow.*

Later documents and discussions elaborated this basic framework. By the time this project began our advisory committee representing state and local workforce managers defined the goal of ISD this way:

1. Increase the number of people enrolled;
2. Help every enrollee understand his or her skills;
3. Help every enrollee improve his or her skills;
4. Every enrollee will get a better job with his or her skills.

An early, critical decision made by EDD leadership was that the project would work with Local WIA areas who volunteered to be Learning Labs, no one would be compelled to

participate. This was called the “collation of the willing”. An initial group of 18 local areas eventually produced 12 local areas who were willing to be the first group to implement ISD.

In talking with state level and local managers in the system a single phrase is repeated over and over to describe the purpose of ISD: “all means all”. This refers to the practical ISD goal of enrolling all clients who “come through the door” in WIA and to get them enter a resume in EDD’s CalJobs system which makes them officially Wagner-Peyser clients as well. This single idea became an important piece of the ISD vision.

With further exploration of the initial ISD model it quickly became clear that, given the broad guidelines and the diverse local contexts, the actual programs that emerged from the initiative would likely differ from each other significantly. In this report we document the experience of four Learning Labs from four different settings to gain insight into how the program was finally implemented in the field. We identify the lessons these “early adapters” offer for other local areas who wish to integrate their services.

Each local area that became a Learning Lab developed and submitted a plan to the state. Our review of these plans found them to be very general. We were stuck mostly by the lack of specific goals at both the state and the local area. It is clear the overall purpose of the ISD initiative is to experiment with new ways of bringing together separate programs at the local level to better serve California Workers. Our goal in this formative evaluation is to describe what happened as ISD was actually implemented in the field and identify critical lessons learned.

To guide our work we developed, in consultation with our advisory committee, six evaluation questions.

7. How did the process of service integration proceed? How did the experience vary from site to site and how did the process vary from the planned process?
8. What specific methods and activities contributed most to successful integration?
9. What barriers and challenges emerged in the process and how were they overcome?
10. How were the broad goals of the program operationalized at the local level?
11. What data are available at the local and state level to measure the achievement of service integration’s goals?
12. What lessons have been learned that would help other local areas implement service integration?

In this report we use our analysis of these four diverse Learning Labs to answer these questions and to provide insights about the ISD program.

II Approach

APPROACH

Overview

This evaluation of the Integrated Service Delivery (ISD) initiative has two Phases. Phase I was a formative evaluation to study the implementation of ISD. The second Phase will be a summative evaluation which will measure the impact of ISD. In this section we describe the approach we used in the Phase I formative evaluation.

The formative evaluation used case studies of four ISD sites that were part of the original 12 Learning Labs. We chose a case study approach because it allows researchers to enter programs with a blank slate and capture the reality of what actually exists in rich detail, rather than imposing a template of what they think exists or what they think should exist.

The case studies were designed to answer the following evaluation questions which we developed working with our evaluation workgroup:

- 1.How did the process of service integration proceed? How did the experience vary from site to site and how did the process vary from the planned process?
- 2.What specific methods and activities contributed most to successful integration?
- 3.What barriers and challenges emerged in the process and how were they overcome?
- 4.How could the broad goals of the program be operationalized at the local level?
- 5.What data are available at the local and state level to measure the achievement of service integration's goals?
- 6.What lessons have been learned that would help other local areas implement service integration?

Case Method

The case study method had five components that are each described here.

Site Selection

After consulting with the evaluation workgroup, we recruited four local areas that would capture the diversity of contexts in which the ISD program was implemented. Within each local area we selected a single OneStop as the case study site. We only considered comprehensive OneStops because non-comprehensive sites did not have EDD present in their locations. While selecting the local areas we considered geography (north, south, and central), size, type of area (urban, suburban, and rural), nature of the labor market, and institutional arrangements (were OneStops operated by government or contracted out).

We selected one large urban site in Southern California where the economy is diversified, and OneStops operate in a variety of arrangements. The second site is small and rural, with a largely agricultural economy. The third is a large suburban government operated site located in Northern California with a local economy dominated by technology companies. For the fourth

case study site, we selected a large urban local area in Southern California with government operated OneStops. The local economy in this area is dominated by four high-growth industries, transportation, oil, healthcare, and green jobs.

As part of the project, the State offered a \$10,000 payment to local areas who agreed to allow one of their OneStops to be a case study site. Sites were promised strict anonymity so that they would be willing to open their practices to the researchers.

Initial Site Visit

Before the initial site visit we developed a profile for each of the case study sites. The profile included a review of the Local Area's annual plan, the original Learning Lab Proposal, EDD data on the local context, and identification of key staff members.

We made initial two-day visits, to the sites to generally get to know the OneStop and how it operated. Specific activities included:

- tour the OneStop to get an overview of the operation,
- collect critical documents,
- review available data,
- interview staff to get the history of implementation to date (interview guides used in the initial site visits are included in See Appendix),
- sit in on meetings,
- attend workshops,
- interview clients,
- attend an orientation,
- observe activities at reception
- observe activities in the resource room.

From these activities we created a process map of the ISD process as well as floor plan of the OneStop.

The interviews helped to get the story of the ISD implementation. The interviewees included the Local Area executive director, WIB members, EDD regional manager, OneStop manager, finance manager, data manager, head of each responsibility center, EDD sub-manager, major co-located partner staff, both WIA and EDD staff, and clients. We usually started the case study by interviewing the management and then interviewed staff during the follow-up visits. In some cases, we performed focus groups with WIA and EDD management at the same time.

To make the observations more comprehensive, we also collected all the marketing handouts and activity schedules. The handouts show how the OneStop presents itself and documents the services that are offered to clients. We also asked for performance and enrollment reports of the OneStop and the local area for pre-ISD period (FY 2007-08), first year of ISD (FY 2008-09) and current year (FY 2009 – YTD). We asked each site manager to provide us

participant reports from their local data system. We compared this information with reports from JTA database for the local areas.

Follow-up Visits

We made additional one day visits to track the progress of implementation and gain further in-depth knowledge. In these visits we did further interviews with staff and clients, attended meetings and workshops. In general we tried to fill in the holes in our knowledge and to check our understanding about how the OneStop operates within the ISD model.

Cost Analysis

As part of another study, the CWIB funded the development of an online Activity Based Cost (ABC) analysis tool for OneStops (See Moore et.al., 2007 for a complete description of this project). Each site's fiscal manager was asked to enter their OneStop cost data into the OneStop Cost Study tool. The online tool uses the Activity Based Cost (ABC) accounting model to conduct its analysis. The purpose of Activity Based Costing is to better understand the real costs of producing a product or service.⁴ The ABC approach focuses on the processes and activities that produce specific services rather than the traditional line items found in government budgets. This tool identifies all the resources and costs that are "under the roof" of OneStop. Then it traces those costs to the activities that generated them and ties those costs to the services produced. This tool also helps calculate the value of OneStop partners' contributions. The tool returns a report benchmarking the case study OneStop costs against other OneStops⁵. We believe that analyzing OneStop cost allocation and their partner's (especially EDD partner) contributions allow us to look at the integration through the prism of expenditures and costs and add additional insights about the critical success factors.

The results of the ABC analysis were used to describe each site and to benchmark their use of resources against other sites in the database.

Case Write Up

At the end of the visits, each site was written up as an independent case. The purpose of the case study was to answer the research questions posed for this phase of the evaluation. Multiple members of the project team reviewed each case. When we thought the case was complete we sent it back to the site for review and comment. OneStop staff at the site provided feedback about the accuracy of our observations and analysis, we considered all comments and made appropriate revisions.

⁴ For a general introduction to ABC see Cokins, Gary, et.al (1992) *An ABC Manager's Primer: Straight Talk on Activity-Based Costing*, Irwin Publishing.

⁵ A complete description of this project can be found in the projects report: *California OneStop System cost Study Report* (2007) Sacramento, CA: California Workforce Investment Board, available at www.calwib.ca.gov .

Overall Analysis

Once the cases were complete all members of the team read all the cases. Through a process of discussion and analysis, the team identified key lessons learned. Using strategic analysis framework the lessons learned were divided into “critical success factors” that support the implementation of ISD and barriers to implementation. Further we split the critical success factors and the barriers into items that are imbedded in the context, such as the size of the local area or the history of cooperation between the Local Area and EDD, and items that were part of the actual implementation effort.

Data Systems

An important part of the project was to study data systems that support ISD. This analysis had two purposes. First, to be able to understand and interpret the data used to describe the case study sites, and second, identify data sources for Phase II of the evaluation.

This activity began with meetings with data managers in EDD at the state level. We also met with regional and local EDD managers to discuss data system and look at data reports. With case studies we looked at the use of state level and local data systems extensively.

We actually extracted data from CalJobs, JTA and various local systems including as part of this effort. A chapter in this report presents our observations about the usefulness and limits of each of these systems.

III Big City OneStop:

A Tradition of Good Government and Cooperation

Big City OneStop:

A Tradition of Good Government and Cooperation

Once a month all six Big City's OneStop managers gather to meet in a large conference room. Members trickle in and cheerfully greet each other. Two women take seats side by side at the head of the table. As I am a visitor, one of co-leaders asks everyone to introduce themselves. The 26 people seated around the table introduce themselves by simply giving their name and their OneStop. I notice quickly the people sit with their colleagues from their OneStop. No one mentions whether they are an EDD or WIA employee. At the head of the table sit two women, one is an EDD senior manager and other is from WIA. Over the two hour meeting many difficult issues are discussed, and many comments are made about policies or practices that will affect "my OneStop" but no one ever refers to "my agency". As the meeting progresses I realize that the depth of collaboration and collegiality I have been hearing in interviews is real and has become institutionalized.

The Context

The local WIA area encompasses an entire large county, which has a workforce of over 1.5 million people. Its labor market represents almost 9% of all employment in California. The region is a transportation hub and historically the economy has been dominated by military bases and related industries; especially manufacturing. Rural parts of the county have a substantial agricultural sector. In today's economy, the dominant sectors remain manufacturing with a strong Tech and Bio-tech sector, tourism and research related to tech and Bio-tech. According to the latest EDD forecast over 74% of new jobs will be created in four industry sectors: Professional and Business services; Trade, Transportation and Utilities; Government and, Leisure and Hospitality. Currently the unemployment rate is 10%, slightly below the state average.

The county has a large education segment including, several community colleges, two CSU campuses, a UC campus and several private colleges and universities.

Local WIA Area

The local WIA area is a consortium of a major city and the surrounding county government. Together they formed a local Workforce Investment Board. The administrative entity for the local workforce program is the Workforce Collaborative, Inc., a non-profit corporation. The Local WIA area has six comprehensive OneStops, which are operated in turn by contractors which include for-profit and non-profit organizations as well as a school district.

In its most recent *Local Plan Modification* the WIB revised its mission "to foster economic growth and prosperity through education, training and lifelong learning,..." It similarly revised its vision for the region to "the Big City Region will be home to the world's most highly educated and skilled workforce; where a corporate and community-wide

commitment to lifelong learning will fuel unprecedented innovation, creativity and economic achievement”. These revisions are a conscious response to the economic down turn and a commitment to focus resources on education and training.

This local area has a reputation within the state for being well run, with strong private sector involvement. Senior managers from the local area are active in state level activities. Local managers see themselves as modern managers who are well informed, one manager was quick to point out his copy of *Good to Great*, the best selling management book, and talk about how managers had a seminar to discuss applying these ideas to the their local workforce system.

All six comprehensive OneStops in Big City are run on the ISD model.

The Decision to Adopt the Integrated Service Delivery Model

Staff, OneStop Managers, EDD Managers, and Workforce Executives all agree that before ISD adoption there was a positive and collaborative relationship between EDD and the local County WIA program. Prior to ISD, EDD and WIA were already co-located in several OneStops. This relationship seems to have set a positive context for the decision to become an ISD site. One senior manager noted: “we had a great a relationship with EDD, ISD tested that, but now it is even stronger.”

Both EDD and Workforce senior management were introduced to the ISD concept at a state meeting. Interestingly WIA managers say it was the Regional EDD manager who was most sold on the idea. One WIA manager commented that “we [WIA] had driven most initiatives, but EDD drove this. The EDD Regional Manager has always been engaged and had a seat on the WIB, she was a trusted person in our region, who looks at the system as a whole and she liked this idea.” The WIA manager further added “we are always looking to make systematic change. We knew EDD and WIA did the same thing.”

Both senior WIA and EDD management were conscious of the need to bring middle management and staff into the decision to implement ISD. One senior manager said “We know that everyone had to buy in.” To create the buy in, the senior management brought in Greg Newton the state’s ISD consultant to introduce ISD to all WIA and EDD staff in a four hour session. A “Senior Leadership Forum” of WIA and EDD managers was created where managers were asked frankly “Who is out and who is in?” All managers publicly affirmed their commitment to ISD.

Senior managers did not anticipate that the implementation of ISD would be easy. One manager noted the stereotypes that each agency had about the other. “We all have our baggage. We needed to dispel the ideas about what the other culture can and cannot do.” He recognized the differences in the two agency cultures. “We’re [WIA] autonomous fast and innovative. We understand the limits of EDD. They’re unionized and top down. We need to know that dynamic.”

Rolling Out ISD

To sell the idea to front line staff the senior managers emphasized the gap between the number of people who “came through the door” and the number of people who actually received services. They pushed the idea that the goal of ISD was “not to just to get numbers” but to “serve everyone”. EDD and WIA staff trained together in a series of forums. The senior WIA manager emphasized that at every forum “The EDD manager and I stood side by side and answered questions together.”

The strategy for implementation of ISD was to bring EDD and WIA staff from all the OneStops together to let them do the process redesign collaboratively. They started from what they called “The Greg Newton Model” which was the model presented by the state’s consultant. Our understanding is that this model was largely build around the idea of enrolling every customer in WIA, and creating three teams of combined EDD and WIA staff: A welcome Team, a skills/employment team, and a Business/employer team. The process would be reengineered within each OneStop to reflect this basic structure. Within that structure each OneStop management wanted to customize the model to both the local area and each OneStop, as one senior manager put it: “We wanted local variation but within a framework. But, what we tell clients needs to be true across all sites.” So the challenge to staff was to develop a single framework and then to make “local plans” for each OneStop.

A working group of 40 people met every week or two for a year to complete the redesign. There were working groups on different aspects of the redesign but managers claim that final decisions were made collaboratively, by all 40 people. Combined EDD and WIA leadership continued to meet monthly.

Despite all the planning the senior manager noted that the actual launch did not go smoothly: “As much as you plan, you will launch and it will bring your system to its knees!” He particularly mentioned the problem with entering all the required data to enroll every client. In fact, they started closing centers at 3:00 PM to allow the last two hours of every day to work on issues that emerged in the implementation and fine tune the process; as well as catch up on data entry. “We were in a world of hurt” was his description of the launch period.

Senior WIA and EDD managers went to all sites to attend regular debriefing sessions about implementation. Slowly, over-time, by sharing insights and solutions, the process became more manageable and problems were solved. For example, at one point clients had to wait three to four weeks to get into an orientation, making it clear that design changes would be necessary.

Another problem that emerged quickly was that “we went from two silos [EDD and WIA] to three silos; welcome team, skills team, employment team”. According to the senior manager, soon after implementation, people so identified with their team that barriers and stereotypes between the teams began to undermine performance the same way old barriers between EDD and WIA had undermined collaboration.

Senior managers noted that the same problems tended to emerge at all sites so they knew that the problems were inherent in the design and not specific to a particular site. This insight

helped them eventually find systemic fixes to the problems. For example, rather than have staff assigned to a single team they had staff move among the functions by cross training individuals, essentially doing away with the three teams and instead having three functions among which staff moved.

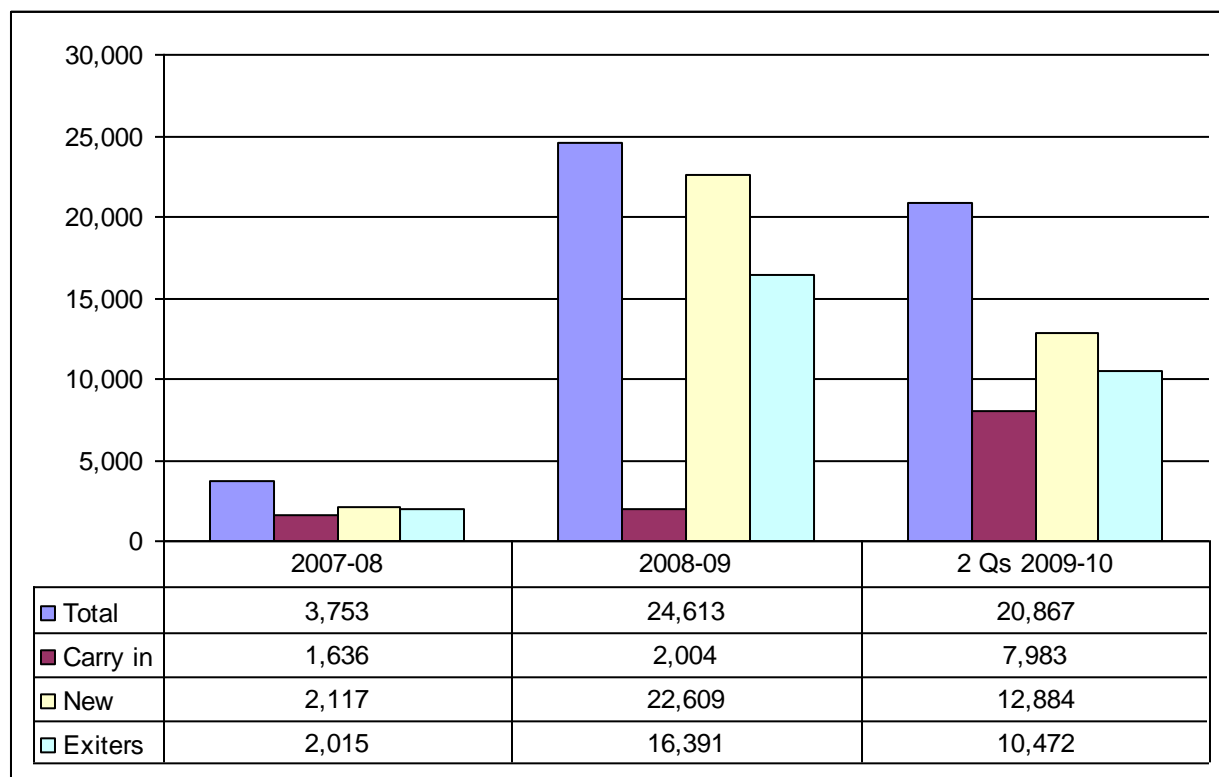
Managers admit that despite the effort to engage all managers and staff in planning many resisted the move to ISD. “A number of staff were waiting for the initiative to die. It tests your resolve from a collaboration perspective”, commented one manager.

It is important to note that not all problems were resolved and the local area is going through a second redesign of the system, which they call ISD Phase II, to solve the problems that emerged from the first reform. We will review the plans later in the case.

ISD and Service Volume

Figure III-1 shows the explosive growth of WIA enrollment that came with the implementation of ISD. In the year before ISD the entire local area had 2,117 new enrollees. In the first full year of ISD the number shot up to 22,609 over a 1,000% increase. Data from the first two quarters of the 2009-10 program year indicate that this growth will be sustained. These data come from the state JTA records which are the official records transmitted from the local area to the state.

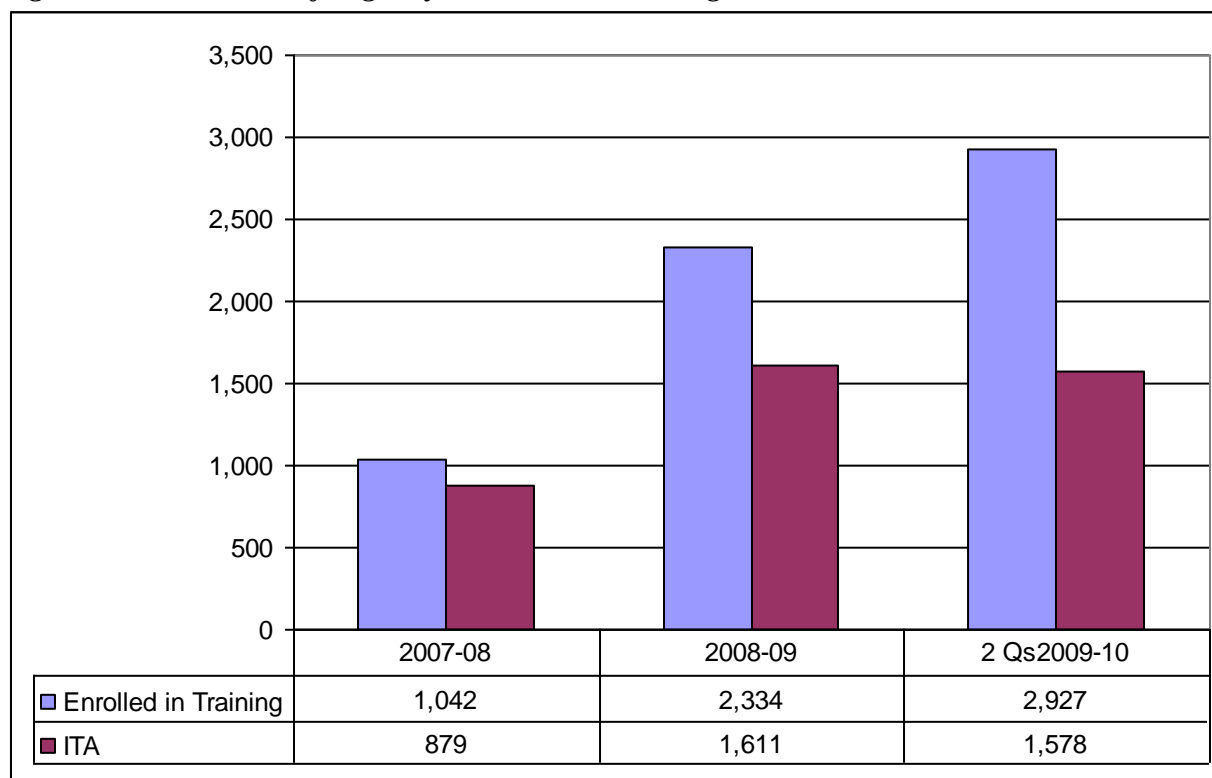
Figure III-2: Number of Big City Participants Enrolled and Exited in WIA 2007-08, 2008-09 and 1st Two Quarters 2009-10



We compared this data with local data from the local CISORS system and we could see clearly that pre-ISD the local areas served over 29,000 clients yet enrolled only slightly over 2,000 in JTA. So despite the explosive growth in the number of enrolled clients in 2008-09, the first ISD year, the total number of people actually touched and recorded fell to 24,613 and decline of over 4,000 or about 13%. We asked local managers about this decline and, while they had not noticed this change themselves, they agreed it was likely they actually served fewer people. The paper work requirements of enrolling may have discouraged a significant number of participants who in the past used universal access services.

Next we looked to see what impact the increased focus on training had. As Figure III-2 below indicates the number of clients enrolled in training also grew dramatically. In 2007-08 1,042 clients received training services by 2008-09 the number more than doubled to 2,334 the first year of ISD. The number of clients receiving Individual Training Accounts (ITAs), essentially a training voucher followed a similar pattern. These trends persist through the partial 2009-10 program year, with more clients receiving training in the first two quarters of 2009-10 than in entire year of 2008-09.

Figure III-2: Number of Big City Trainees in Training 2007-08 to 2009-2010



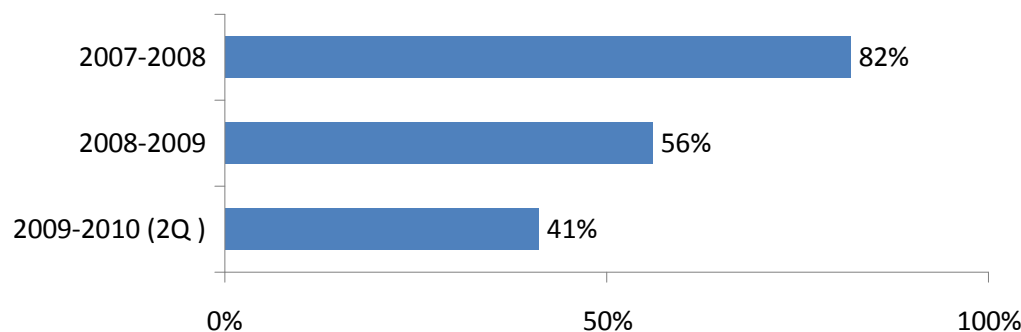
ISD and Performance

We were interested in how the move to ISD would affect Federal performance measures. Many observers believe that most local areas manage their performance by being selective about

which clients they formally enroll in WIA, a strategy often called creaming. In a system where the goal is to enroll everyone there was bound to be an impact on performance. As the figures below indicate performance did decline on Federal measures for adult and dislocated worker clients.

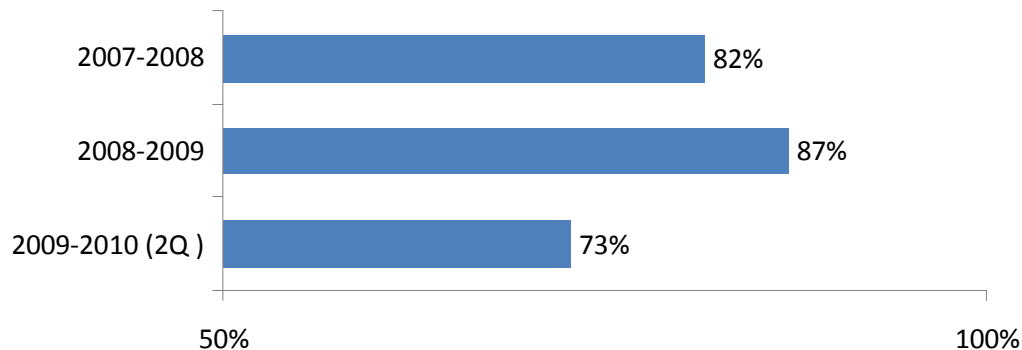
As Figure III-3 indicates the entered employment rate fell steeply from 82% in the year before ISD to 56% in the first full year of ISD and then dropped again to 41% in the first two quarters of 2009-10. All of this decline cannot be attributed to ISD as the economy fell into recession at the same time. It is also important to note the substantial lag time in the calculation of federal measures. Because the measures focus on what happens to clients in the labor market after they leave the program and due to reporting lags in the unemployment insurance system which provides the data, results are for clients who exited the program as much as nine months earlier, hence the data from 2008-09 are largely for clients who were not served under the ISD model but the old model, while data for the first two quarters of 2009-10 are for clients served by the ISD Model.

Figure III-3: Big City Entered Employment Rate for Adult and Dislocated Workers 2007-08 to 2009-10



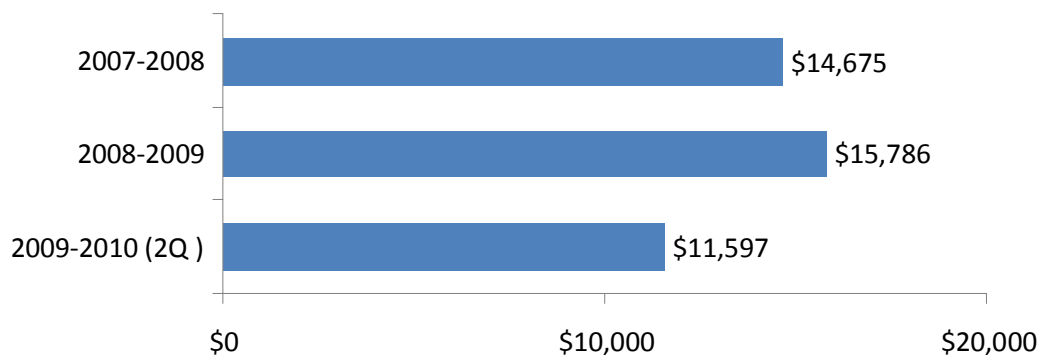
The retained in employment measure in Figure III-4 (how many clients who left the program were still employed six months later) actually improved in the first year of ISD. Again this represents a pool of clients served in the year before ISD. In the first two quarters the following year, the larger pool of clients served by ISD, showed a marked decline from 87% to 73%. Again much of this decline could be attributed to the recession.

Figure III-4: Big City Retained in Employment for Adult and Dislocated Workers 2007-08 to 2009-10.



The earnings measure which reports the earnings of clients the first two full quarters after leaving the program showed a pattern similar to retention. In 2008-09 the first year of ISD earning rise slightly, but this is largely a measure of clients served during the pre-ISD period. In first two quarters of 2009-10, the population of clients served under the ISD system showed a marked decline of over \$4,000. Again the recession must play a role in this decline.

Figure III-5: Big City Earnings Measure for Adult and Dislocated Workers 2007-08 to 2009-10



In our interviews, Local Areas and OneStop managers were concerned about the impact of ISD on performance. While State officials had promised to not punish local areas that adopted the ISD model for any decline in performance, in the long run local managers believed that lowered performance would eventually hurt their Local Area. Their primary frustration with the current situation was that many clients went through enrollment process and only visited the OneStop once or twice and yet the local area was responsible for the clients' outcomes.

Despite these worries, the local area did not appear particularly driven by the federal performance outcomes. A OneStop manager of a contracted OneStop pointed out to us "I don't have an enrollment goal because the goal is to enroll everyone." She added that she did not have

goals for the Federal performance measures either. The OneStop manager we interviewed felt her OneStop's performance was evaluated based on how well they kept up with data entry and by the number of people completing training. This view was confirmed when we found out the local area did not breakdown Federal performance measures to the OneStop level. So, while the local area knew its performance it did not track the individual performance of each OneStop and hence did not hold them accountable for their contribution to the Local Area's overall performance.

Case Study Site

Our case study site is Big City OneStop, a large comprehensive OneStop serving the southern section of the county. The area is densely developed, with relatively modern housing, crisscrossed by freeways, with many large shopping centers. The OneStop is located in a large commercial shopping complex along with several big box retailers, a proprietary college, a 24 Hour Fitness Center, and a Home Depot.

The OneStop is in a large, square, modern building. Both the local WIA OneStop Logo and the EDD Logo are on the glass around the front door. The entry way leads to a large lobby with a high ceiling, a skylight and a tile floor. The lobby is a bit noisy and filled with activity. On the left hand wall is a large reception desk where two staff members handle incoming clients who wait in a short line. The lobby has a waiting area with five chairs and nine computers (which we learn later are for CalJobs access only⁶).

The lobby is filled with information. On a stand is a calendar for the day, and an announcement about the availability of a disability navigator. A rack holds an array of handouts. There is a bulletin board filled with job listings, many from defense companies. A second board posts flyers about "training options".

The lobby is busy, when we observed for an hour, one afternoon, we saw 27 people pass through the lobby. They were a diverse group, the most were men, and clients included substantial numbers of African-Americans, Whites and Hispanics.

To the left off the lobby is a large room that is the "research library", down a hallway to the left are classrooms and small offices where staff and clients meet, to the right behind a secure door is a large cube farm, where WIA and EDD staff have their "home" cubicle, there are also a staff break room and several conference rooms. Off the hallway is small break room for clients with snack and soda machines.

⁶ We learned later the computers were put in the lobby to handle clients who need services but do not want to go through the lengthy registration process. Lobby computers serve a dual purpose: 1) clients who do not qualify for WIA program can search job listings on CalJobs; 2) clients who want to qualify or continue receiving UI insurance need to upload resumes on CalJobs. Time on those computers is limited to 30 minutes. Even though those computers are intended for self-service, there is a staff person working in the lobby, answering technical questions and helping disabled people to get through the door. We also found out that clients that only use the lobby services are not counted in the number of people serviced.

OneStop Structure

The center is managed under contract by a non-profit organization, based in another state. This company took over management of the OneStop from the local operator on July 1, 2008, which was also the first day of ISD implementation. Because the new operator kept the entire WIA staff including the manager, the transition did not affect the rollout of ISD. The OneStop has a large EDD operation. In fact the EDD operation, with about 60 staff, is substantially larger than the WIA operation, with only 17 Staff.

Walking around the center talking with staff, the site seems very integrated. The cubicles of WIA and EDD staff are mixed together. Employees wear the same badges and do not introduce themselves as EDD or WIA employees, but rather define themselves by their role. We have to ask to find out for which agency they work.

We interviewed the WIA manager Elaine and EDD manager Alice together about their experience implementing ISD. The women appear to be about the same age and share an energetic and open demeanor. We were impressed with the cheerfulness, trust and goodwill that the two managers showed each other. They had worked together throughout the planning and implementation of ISD at this site.

Planning ISD

Both managers participated in the regular planning meetings for ISD implementation in 2007-2008. The managers supported the idea because they already worked well together. They had developed a shared vision for how they wanted their staff to work together even before the idea of a Learning Lab was introduced.

Both managers report that they had a say in the decision to move forward with ISD. They noted that “everyone agreed that it was worth a try”.

These managers generally confirm the description of ISD’s development we heard from senior managers. At an all-staff meeting senior managers presented the ISD model to the staff. In parallel with the local area planning these OneStop managers ran a planning process in the OneStop. Eve and Angie report that the vision was to have one common customer, common goals and to consolidate resources.

The managers report that there was a mixed reaction from staff. “There was a lot of excitement at first, but later on some employees started to doubt that the ISD was such a good idea.” They noted in particular that some EDD employees, who are union employees, believed that the integration was a threat to them – WIA employees would learn the EDD system and take over their jobs. Overall, however, the managers believe that the staff accepted ISD. It’s important to note that in the planning phase EDD had only 22 employees and WIA had 14 employees.

Both agencies have since added employees with ARRA funding. Both managers observe that the new employees were more receptive because they “only know the ISD way of doing things.” In addition EDD experienced a wave of 10 retirements and the new people brought in

also only knew the ISD approach. Both managers believe that the addition of new employees and turnover of longer term employees made the transition easier.

Eve notes that ISD "... was not a shock because we worked well together before integration." Local WIA staff and the large EDD operation had been co-located for a number of years. Eve also pointed out that in the state where her company was headquartered already had integration so her senior management was supportive. Angie adds that there was little conflict during the planning "We had the same vision on how we wanted the staff to work together."

The Process and How it Evolved

As a senior manager noted, after a year of planning, when the ISD model actually launched the volume confronted by the Centers "brought the system to its knees."

The center followed the planned three-team structure (welcome, skills and employment teams) and enrolled everyone who came to the OneStop. In this section we will describe how the ISD process evolved over time.

Process:

Here we will describe the original process and then how it evolved based on early experiences.

Step 1: Reception:

A receptionist greets the client, asks if the client has filed for UI already, provides the client with options, tells the client about the orientation and the 3 minute video, and directs the client to sit in a room and watch the video orientation.

Step 2: Orientation Video

Client watches three-minute orientation video (in English and Spanish, reoccurring video).

Step 3: Orientation Appointment

Client returns to the reception desk where the receptionist asks if they want a full orientation. About 90% of clients wanted the orientation. The receptionist schedules them to attend an orientation session (there was about 3 weeks waiting period for an orientation during the initial period). English and Spanish speaking clients were scheduled for separate orientations. In the meanwhile clients were advised to go to libraries and look for jobs on computers there.

Changes:

The first insight, as one manager put it, was that "all does not mean all". This is a play on a phrase from the ISD training where it was emphasized that all clients should be enrolled and that "all means all". During early months of implementation managers realized that they were not able to handle the vastly increased volume driven by the severe recession and the need to enroll all clients. They also found that some clients did not want to enroll but simply wanted one-time service such as completing a UI claim or posting a resume in CalJobs. Originally, the

center had no open access computers; you had to be enrolled to have access to computers. However, after two months, computers were set up in the lobby so people could access CalJobs in the lobby. This allowed people who just wanted to file a UI claim or post a resume to do so without enrolling. Interestingly no records are kept on the number of people served this way. Later staff were added to assist people in the lobby.

Originally people watched the video before making an appointment for an orientation session. Now, first time clients are told at reception that if they want to do more than use the lobby computers they must come to an orientation. Orientations are held only on Mondays and Thursdays, two orientations in Spanish and two in English each week (based on April calendar). Appointments can be made for the Thursday Orientation but Mondays are first come first serve and limited to 25 clients so clients are sometimes turned away. Most clients must wait a number of days to enroll.

A handout given at reception to those who want to enroll provides a list of documents clients must have to enroll and warns “please note that **without original unexpired documents you will not be able to attend orientation.**”

The form then lists seven documents clients may need, including their printed out CalJobs resume.

Step 4: Group Orientation

Clients need to have all the required paper work such as right-to-work documents and draft paper work at the orientation. Orientation describes what services and training are available. It talks about one-on-one coaching, support services, UI, WIA application, etc. Orientation time was increased from 30 minutes to 60 minutes during the early days of ISD. Orientation and enrollment were planned to take place in one day but, in fact, the system soon failed to keep up with the volume and clients had to wait as much as three weeks to be scheduled for an orientation.

Step 4: Individual Appointment

After the orientation the whole group would get enrolled and receive one-on-one eligibility coaching. Managers report that 99% of all clients who attended orientation got enrolled. Everyone had to register in CalJobs to be enrolled.

After enrollment, clients were directed to take a basic assessment test (online 21 question math and reading test) powered by ProveIt system. The career advisor would look at the results of the test and refer clients to training or a job search. Sometimes staff would schedule a follow-up appointment with someone in the skills team and that employee would talk to the client about training opportunities and help to place the client in training. However, most people did not receive ITA's. In fact, in the first year of ISD all training money was spent by September, some additional training funds were received in May, but for most of year only limited non-ITA funded training was available. Some training was available in the center such as a computer lab that had self-paced MS Office training. The Skills Team also did development work with those

who were not "job ready". To be "job ready" clients need to know what job they were seeking, have the skills for that job and have an appropriate resume.

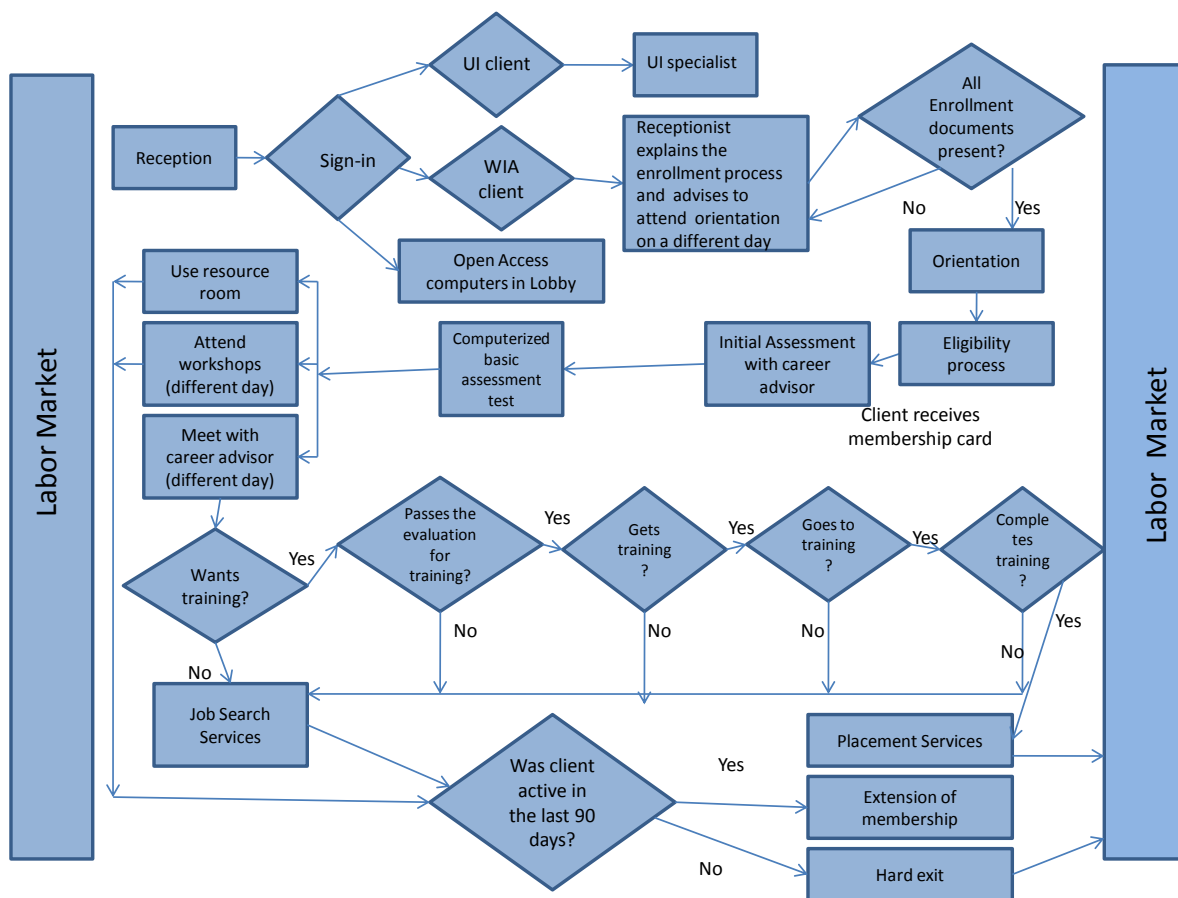
Once enrolled and assessed clients had access to the research library where they could search for jobs or develop their resumes and cover letters.

Changes

The first four steps of the process have remained largely the same. The video is now only shown in orientation to people who have brought the required documents, rather than before orientation. The actual group orientation session is largely a group intake where besides the video the main activity is completing paper work.

The graphic below is our interpretation of the OneStop's integrated process. While the formal flow chart posted on the wall of the OneStop appears much simpler, we believe this diagram captures the real complexity of the process.

Figure III-6: Current Process Flow



Business Services

Business services were also part of the ISD reform. In this OneStop business services are a relatively small part of the operation. Business Services has two staff—one WIA funded and one EDD funded. Our cost analysis, discussed in detail later, showed business services represented just 5.5% of OneStop costs. The business service unit focuses on two activities: first contacting employers to find job openings and second being the liaison for rapid response activities.

The business services staff participated in the planning of ISD and were initially part of the employment team. Prior to ISD, EDD and WIA already jointly staffed business services so ISD did not mark the beginning of cooperation in this area. Staff pointed out the EDD and WIA personnel had always been in side-by-side cubicles and were a “real team”. Since ISD and the focus on serving everyone, the business services representatives have been pulled into the job seeker process. The business services representative we interviewed reported she spent one hour a day in the research library, an activity she had been cross-trained to do as part of ISD.

Overall the business services staff felt that ISD had taken some focus off business services because of the huge demand created by trying to enroll all clients. Currently there is no single EDD person in business services but a number of EDD staff are cross-trained to deliver business services. It is not clear if due to a lack of demand for business services or simply responding to the huge demand for individual services caused by the recession.

Other Issues that Emerged

As the staff worked through the implementation of ISD and worked hard to create a truly collaborative way of working together a number of important issues emerged. Here we briefly describe those issues and how they played out.

Unemployment Insurance issues: All staff were expected to understand the UI system and be able to answer UI questions. At this time the UI navigator position did not exist, so clients were often given minimal information about UI. EDD staff trained WIA staff about UI, but WIA staff could not serve as the single point of contact (SPOC) for UI. EDD managers wanted all employees to be able to serve as the UI SPOC and they took the issue to senior managers in Sacramento, but in the end it was not allowed.

Paperless: The original design was for a paperless process. But, even from the start, some paper, such as signed assurances, were retained in trainee files. They also kept verification documents. But now, due to issues with federal audits, they are copying client documents such as right to work or UI letters, and for clients in training or who come regularly to center, they are going back and getting documents.

Restructuring Teams: Soon after the launch of the ISD model managers realized that the model was not perfect and not working properly. The three-team approach was not working because the teams lost connection with each other (the center had become silos of teams instead of silos of EDD and WIA). Team members were complaining about what members from other

teams were doing (some clients were assigned to both teams). Therefore the center got rid of three-team approach and adapted a functional approach instead (resource room, reception, UI orientation, workshops). With this approach an employee can perform multiple functions and be a career adviser.

They remain integrated in the functional areas. Business services had been integrated before the ISD model was implemented. Business Services has equal representation from EDD and the WIA staff. They do rapid response, recruitment, utilization of CalJobs system, economic development, ARRA funds identification, and other tasks.

A new position was developed—initial interviewer. Previously known as case management, this position sees new clients and develops initial employment plans.

In the lobby there is a volunteer, who is part of the Title V senior program, that helps clients on computer, opens doors, etc. This volunteer is a client himself and is developing skills while volunteering at the center. Vet programs have a veteran networking group but there is no networking group for regular members.

Functional supervision: Managers told employees upfront about the functional supervision, explained how it would work, and whom employees should report to for different issues. This upfront approach helped avoid many problems. An example of a problem that was solved: one skills team member (EDD employee) did not want to respond to a workforce manager. After a few meetings and discussions that EDD employee was moved to teach workshops on labor markets.

Having EDD and WIA managers of equal status, who also had a good relationship, seems to have contributed a great deal to making the functional supervision model work. Staff appear to be comfortable with both sides of leadership.

Data Entry. Enrolling so many people requires a massive amount of data entry. Clients provide data on paper and staff does all the data entry. The OneStop manager estimates that the average staff person spends 25% of their time on data entry. When we interviewed some staff members about their schedule they noted that they are scheduled half a day a week, 10% of a work week, just to “catch up on data entry” in addition to their daily data entry activities. The center does not have a swipe card system and staff who work in the resource room or meet one-on-one with clients will jot down their ID number and the activity they completed, then enter these activities into client records. Currently the OneStop is committed to entering all clients and their activities into the local CISRS system and CalJobs, thus making all entries twice.

Text Box III-A: Getting Oriented

To understand the process we went through the orientation as a client would on a Monday morning in April.

We arrive at 9:00 and see five people waiting in line to have their right-to-work and other documents checked. Talking with clients later we learn that this is one of the orientations that does not require an appointment. But, because it is limited to 25 people or so, clients eager to get into the center are at the front doors at 7:00 to get in line and wait for two hours in order to assure themselves a place in the orientation session. Staff had told us the orientation is limited to 25 people with five spaces reserved for veterans.

After having their documents checked clients sit in a classroom setting with rows of narrow tables and talk quietly. We count 27 clients, 26 arrived by 9:00 and one slipped in late.

There are two staff at the orientation, Oscar who is the instructor and Deana. As clients came in Oscar sat at the desk near the door and collected eligibility documents; then Donna took the folder and went to make copies.

Oscar started the orientation promptly at 9:00 with a video. The video is professionally done and features OneStop staff talking about the services of the OneStop in a positive up-beat way. Several themes are emphasized such as “Find the best job for your skills.” The video contains an animated version of the “Road to Opportunity” which summarizes the services available in the OneStop, and is mirrored in brochures and posters throughout the OneStop. The video encourages clients to “be patient and build skills”. It explains the functions of the three teams. The video ends at 9:10 and the tone shifts from upbeat and positive, to very dry and bureaucratic.

Standing behind a podium Oscar explains there are six centers throughout the county and then begins to march through the paper work in the package each client has received: COBRA Medical forms, anti-discrimination policies, release of information forms, and contact information form. Then he goes over the calendar of activities for two centers and particularly recommends a workshop on dealing with a criminal record. He concludes with information about an employer tax credit. Finally, he explains that certification on typing skill is available on site. We note that none of the presentation is backed up with power point slides or any visuals other than the video and the paper handouts.

Oscar asks everyone to begin completing the standard application. He goes field by field telling people what information to fill-in. Without any visual aides people are quickly lost. Several clients start trying to help each other, but in doing so fall further behind. Clients seem uncertain if they can ask questions.

Looking at our handout we see the form is full of small type and difficult to read. Clients often need specific data like date of layoff, and while they try to come up with it, fall behind. At 9:27 Oscar stops and asks: "Any Questions?" He gets ten questions that he quickly answers. Oscar tries to wrap up the session on an upbeat note. He tells the group "We're glad you are here. It will take a while to review your documents and then you will take the 'Prove It' self assessment and see your advisor. Just be patient and grab a snack if you want."

He then goes around and helps individuals who had problems completing the form. During all this the second staff member remains in the back of the room working on a computer.

At 9:37 Oscar and Deana start calling individuals to the back of the room where they sit across a table from the clients and go over the paperwork. They ask clients to show their eligibility documents, ask about UI claims, if a client is enrolled in any school, if they receive food stamps or other benefits, if they are a veteran and other questions to determine eligibility for enrollment. Clients sit close to each other and there is little privacy. After the brief interview is done, Oscar or Deana gives the file to another employee who has just arrived, and enters some basic data into CISRS, on a laptop computer, to generate a membership number for that client. The client will receive a membership card the same day. Total time for the eligibility/enrollment procedure is about 5 minutes.

Clients then sit and wait to be called by a career advisor.

Text Box III-B: A Tale of Two Intakes

To follow through on the process after the orientation we follow two clients through the intake process.

Jim Wants Training

The first client we follow is Jim, a Hispanic male in his twenties; he is casually dressed. His advisor who comes for him is Sam, an Asian middle-aged woman. She takes Jim into a small room where three advisors sit with clients at tables. The first thing Sam does is to give Jim the workshop calendar. Sam goes through the application, analyzes it, and looks at Jim's previous jobs. Jim was a loan modifier and was laid-off. He then worked for Ajilon and other staffing companies, but got laid-off again. Sam checks to make sure all eligibility documents are in place. This is the third time Jim has had his documents checked since the orientation began.

Sam asks Jim what brought him to the center. Jim says he wants to go back to school for graphic design; he shows Sam the school's application. He wants to know if there is funding available to pay for the program. Sam explains that at the moment there are no funds for training, but they can receive funds any time. Jim asks if he could start college soon and then get reimbursed when the funds were available. Sam tells him that retroactive pay on training is not available. She asks him to check if the specific graphic arts program was eligible for WIA funding; she provides him with a website where he can check.

Then Sam asks Jim to show her his resume and gives him feedback on what should be changed to make it more attractive to employers. She also asks him to email her the resume so she can make some changes on an e-version. Then the advisor talks to the client about the center services, advises him to attend workshops and sets up a one-on-one appointment to take self-assessment test online.

Sam ends the session with an optimistic attitude and a friendly "see you later Jim" goodbye.

Fred Needs a Job..... Any Job

Fred is a middle aged white man with glasses, casually but neatly dressed. He readily agrees to allow us to follow him through the process. Later I find out Fred is a homeless, ex-offender who lives in shelter and got up at 4:30 AM to be in line at 7:00 for orientation; he was motivated because he had missed an earlier orientation.

Lisa, a career advisory, a younger Asian woman, comes into the room and calls his name. We go to a small room where three advisors are talking to clients. It is easy to hear all three conversations if you try.

Lisa begins by going through Fred's paper work; she notes that he has a GED and receives food stamps. She asks about Fred's last position as a landscaper while in prison. Lisa asks if he is interested in training or work. Fred says quickly, "work, any work. Look at my resume. I have management experience in a warehouse where I handled cash." He sets his job target as "warehouse work" which Lisa records in his file.

Asking questions Lisa finds out that Fred has a resume in CalJobs and has his resume in a Word file. She also finds out he has an email account he can access. Lisa briefly discusses how to portray his employment gap that occurred while in prison for a year. She suggests the workshop for ex-offenders which is offered at another OneStop. Fred says the workshop is not convenient. After hesitating he says his Parole Officer may not allow him to go to that neighborhood because there is a school and he is a "290" (which I find out is a sex offender). At this point Lisa, who talks fast, speeds up even more and deflects the issue. She asks if he has any questions, Fred again brings up the problem that he cannot go places where there are young people. Lisa suggests a workshop on interviewing skills to help him deal with how to explain his situation in a job interview. Lisa wraps up the interview by giving Fred his membership card and escorting him to a computer lab.

In the computer lab Fred signs in and takes a brief test of verbal and math skills. Looking over his shoulder I see the math questions go from basic arithmetic and measuring with a ruler to basic algebra. Verbal questions deal with reading comprehension and basic grammar. This is the "Prove it Test" mentioned in the orientation.

Fred is now able to use the research library and attend workshops. He says he plans to come every day until he finds a job.

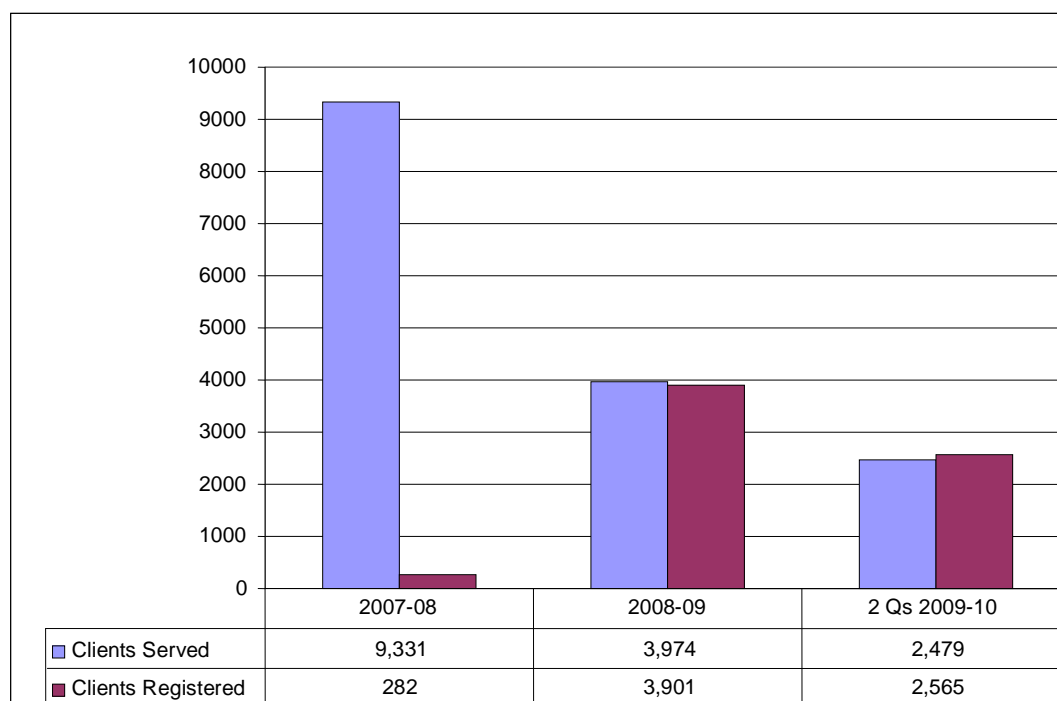
Impact of Changes

Managers estimate that they now enroll about 70-80% of all clients who come to the center. The business in the lobby with the open access computers seems to support this. Managers seem very comfortable with these arrangements. Interestingly, even though clients who just use the lobby sign in, the managers have never counted up how many people use these services but never enroll. One manager commented "I guess we could count it up from the sign-in sheets but we haven't". In their view enrollment depends on what clients want from the center. Those clients who attend orientation usually get enrolled. Therefore the receptionists "screen" people and do not send those to orientation who are not interested in enrolling or are not eligible. However, everyone is advised to enroll to CalJobs.

As below indicates, ISD did dramatically increase the number of clients Figure III-7 registered into WIA at the center, from 282 in the year before ISD to 3,974 in the first year of ISD, an increase of 1,300%. Prior ISD the center had used its local system to keep track of universal clients as well as registered clients. In the year before ISD the center served 9,331 people; during the first year of ISD that number actually declined to 3,974, a decline of 58%. It

is not clear how to interpret this decline in overall clients; it may be that that more were actually served in the lobby and not counted, as they had been in past, or a substantial number of clients may have been discouraged by the requirements of the enrollment process and not been served.

Figure III-7: Number of total clients served and number registered 2007-08 to 2009-10



ISD Phase II

Despite the hard work and good will that has gone in ISD and the vast increase in the number of clients enrolled, managers are not satisfied with the system as it is. One senior manager sums up the problems this way: “...’all doesn’t mean all’. We crippled the system by enrolling 18,000 people and then didn’t serve them; we had thousands of soft exits [people exited from the system automatically after not getting services for 90 days] of people we never saw. The challenge now is to streamline the system without going back to the old system.” It appears that managers are concerned that after making such a large investment in staff time and logistics to enroll people, many clients are getting fewer services and yet the local area is responsible for their outcomes. It also appears that they are concerned about raising expectations among clients that they can’t meet. In interviews both staff and managers felt badly about the large number of clients who want training but who cannot be served.

To this end workgroups have designed a new process that reduces the percent to clients getting enrolled in WIA by about 20%, according to one manager’s estimate, and by 40% according to another. The basic idea behind the new design is very similar to previous universal access, clients that don’t want or need staff assistance will remain in “Tier 1” while clients who need staff assistance or who will receive training will be in “Tier 2” and be enrolled in WIA. Clients who are in Tier 1 may eventually migrate to Tier 2, if they need more intensive services.

Table III-1 below shows the services planned for each Tier.

Table III-1: ISD Phase II Tier 1 and 2 Services

Tier 1 Services	Tier 2 Services
Introduction to Center Services <ul style="list-style-type: none"> • Provide right to work documents • Membership application (client entered into CISRS and PASS) • CalJobs Registration and Resume 	Registration Appointment (one-on-one or group) <ul style="list-style-type: none"> • What to Bring <ul style="list-style-type: none"> ○ Right to work, selective service, employment status must have documents • CalJobs resume verification • WIA Application for eligibility • Referral to a Career Center Representative (CCR) if WIA Eligible CSR will review WIA Registration <ol style="list-style-type: none"> 1. Make Determination to Enroll 2. Enroll in WIA 3. Initiate IEP 4. Refer to other services 5. Issue Tier 2 Membership Card
Services <ul style="list-style-type: none"> • UI Resources • UI Navigation/Phone/ CalJobs • Workshops <ul style="list-style-type: none"> ○ Financial literacy ○ Business Connections ○ Job/Career Fairs ○ Recruitment ○ Job Search Modules ○ Career Exploration ○ Career Change ○ Prove It! • Computer Lab • GED/ Basic Education • Business Service Center (essentially access to Research Library and its equipment) 	Services <ul style="list-style-type: none"> • Comprehensive Assessment (CASAS or 1-1 staff evaluation). • CCR Services (1-1 appointments) <ul style="list-style-type: none"> ○ Develop Individual Employment Plan ○ Training (TAA, OJT, Customized, IHE, ITA) ○ Follow-up retention activities ○ Job Referrals ○ Resume Critique ○ Interpret Assessment Results ○ Assist with additional LMI • Business Service Center (essentially access to Research Library and its equipment) • Employment Related Workshops

Cost Analysis

The California Workforce Investment Board sponsored the development of a sophisticated Activity Based Costing system for OneStops. This system first identifies all the resources and costs that are “under the OneStop’s roof”. Then it traces those costs to the activities that generated them and ties those costs to the services produced creating cost/per service measures. These costs are then benchmarked against other OneStops in the system⁷. Here we present the benchmarked costs for this OneStop. Job Seeker and Business Services costs are benchmarked separately.

The analysis begins by looking at the costs of each partner under the OneStop’s roof. In the Table below we see Big City OneStops costs on the left side of the table compared to the costs reported by a state-wide group of OneStops on the right side of the table. In Big City OneStop we see right away that partners actually account for 74% of all the costs in the OneStop. In fact EDD which had \$3,418,945 in Cost in program year 2008-09, accounts for 74% of all costs. This compares with a statewide median of 21%. Other partners make small contributions. Overall we can see that in Big City WIA accounted for a much lower percent of cost then is typical, but had fewer partners contributing to cost than many other OneStops in the data base.⁸

Table III-2: Big City One Stop Partner Contribution Report 2008-09

High Median and Low from State-wide Group of OneStops								
	Big City Dollar Amount	Median	Low	High	Your Percentage	Median	Low	High
Total One Stop Cost	\$4,632,361	\$2,626,190	\$147,000	\$9,758,580				
WIA Local Area Costs	\$1,202,496	\$1,368,900	\$380,438	\$8,534,000	26%	98%	26%	100%
Partner Costs:								
Aging and Adult		\$32,229	\$24,459	\$40,000		1%	1%	1%
Dept of Rehab	\$8,320	\$16,220	\$1,402	\$1,450,760	0%	1%	0%	39%
EDD	\$3,418,945	\$1,253,480	\$17,023	\$3,418,940	74%	21%	1%	74%
Local Adult School		\$112,605	\$1,801	\$476,233		3%	0%	17%
Local College or University		\$33,550	\$450	\$2,177,200		1%	0%	26%
SBDC		\$71,950	\$4,900	\$139,000		47%	0%	95%
Other Local Part	\$2,600	\$29,984	\$2,600	\$2,614,140	0%	4%	0%	38%

⁷ A complete description of this project can be found in the projects report: *California OneStop System cost Study Report* (2007) Sacramento, CA: California Workforce Investment Board, available at www.calwb.ca.gov.

⁸ It is important to note that data base includes about 20 OneStops from around the state. They are volunteers and hence not a representative sample of all OneStops, but the benchmarks do provide some insights about how OneStops differ from each other.

Next we look at how cost broke down between the job seeker and business services processed within the OneStop. The tables show that in both cases EDD accounted for about 80% of the costs and WIA contributed 20% of the costs.

Table III-3: Big City One Stop Partner Contribution Report 2008-09 By Job Seeker and Business Service Process

Job Seeker Costs

	Your Dollar Amount	Median	Low	High	Your Percentage	Median	Low	High
Total Job Seeker Cost	\$4,377,219	\$1,711,460	\$69,500	\$7,587,580	--	--	--	--
WIA Local Area Costs	\$1,152,491	\$1,205,750	\$371,602	\$6,363,000	26%	98%	24%	100%
Partner Costs:								
Aging and Adult		\$32,229	\$24,459	\$40,000		2%	1%	2%
Dept of Rehab	\$8,320	\$16,220	\$1,402	\$1,450,760	0%	1%	0%	42%
EDD	\$3,213,808	\$1,171,470	\$17,023	\$3,213,810	73%	19%	1%	73%
Local Adult School		\$110,130	\$1,801	\$476,233		3%	0%	20%
Local College or University		\$25,000	\$450	\$2,177,200		2%	0%	33%
Other Local School								
Other Local Partner	\$2,600	\$29,984	\$2,600	\$1,934,630	0%	4%	0%	37%

Business Services Costs

	Your Dollar Amount	Median	Low	High	Your Percentage	Median	Low	High
Total Business Services Cost	\$255,142	\$257,249	\$8,836	\$1,774,520	--	--	--	--
WIA Local Area Costs	\$50,005	\$214,880	\$8,836	\$1,277,400	20%	100%	8%	100%
Partner Costs:								
Dept of Rehab		\$8,000	\$8,000	\$8,000		10%	10%	10%
EDD	\$205,137	\$205,137	\$1,483	\$1,076,090	80%	69%	2%	100%
Local Adult School		\$1,500	\$1,500	\$1,500		1%	1%	1%
Local College or University		\$2,100	\$2,100	\$2,100		2%	2%	2%
Other Local School								
Other Local Partner		\$266,241	\$160,349	\$679,506		20%	14%	38%

The cost analysis shows that Big City OneStop had over \$4.6 million in costs in the 2008-09 program year, the first year of ISD, substantially more than the median sized OneStop in the benchmark group. This includes WIA costs, EDD costs and all other partners in the OneStop. Not surprisingly about 95% of these costs were incurred serving job seekers and only 5% were attributable to business services.

When we look at the activities that generated the costs (see “Cost per Activity section of the table) we see that the distribution of costs reflects the ISD goal of enrolling all clients. The three highest cost activities were “outreach and recruitment”, “developing individual service plans” and “case management”⁹. These costs were substantially above the median for the benchmark group which includes a number of non-ISD OneStops.

After we developed costs for each activity we measured the number of service units produced for that activity and then calculated the cost per unit of activity produced. Table III-4 shows the data for this OneStop with benchmarks¹⁰. Overall the OneStop had average-to-high costs for the services it produced. For example, the cost per individual job seeker served was about \$95 compared to a median of \$22. This indicates two things to us. First, the average client at this OneStop is probably receiving more services than in the benchmark group. Second, that many clients who are served without being recorded in the lobby are not counted so that the average cost per client calculated here is higher than it would be if they were counted as they are at other benchmark OneStops.

⁹ An important note on costs, since this system measures costs that occur under the OneStop roof, training which takes place off site, such as a client enrolled in a community college training program is excluded. So the cost of assessing and case managing a client with an ITA would be included the actual cost of the ITA is excluded.

¹⁰ Note all data is self-reported by OneStop. In some cases while the center reported costs for a particular activity, such as job seeking networks or job clubs, they did report the amount that service produced so not cost per unit of service could be produced.

Table III-4: Big City Cost per Unit of Job Seeker Service with Benchmarks 2008-09

Cost Per Unit of Service	OneStop Dollar Cost Per Unit	Benchmark Median Cost Per Unit of Service	Benchmark Low Cost Per Unit of Service	Benchmark High Cost Per Unit of Service
Cost per individual Job Seekers served (Enrolled Client + Universal Clients. Unique individuals)	\$95	\$22	\$1.79	\$119
Cost Per new Job Seeker	\$73	\$64	\$7.15	\$292
Cost Per Job Seeker Visit	\$67	\$10	\$0.60	\$67
Cost Per Job Seeker Service Event (e.g. faxed a resume, accessed career information on internet)	\$22	\$10	\$0.92	\$40
Cost per one-on-one coaching events	\$125	\$72	\$2.23	\$486
Cost Per Workshop	\$1,981	\$1,016	\$113	\$4,533
Cost Per Person attending	\$132	\$85	\$19	\$572
Cost per Job club or network member	NA	\$709	\$65	\$5,222
Cost per person attending	NA	\$579	\$44	\$1,431
Cost Per Job Seeker completing comprehensive assessments	\$153	\$189	\$14	\$1,124
Cost Per IEPs or other formal plans created	\$277	\$177	\$10	\$675
Cost per client getting case management	\$144	\$144	\$26	\$1,377
Cost per meeting with case manager	\$48	\$61	\$8.92	\$245,846
Cost per client session	NA	\$1,080	\$14	\$13,110
Cost per client ITA or OJT	\$860	\$850	\$134	\$2,288
Cost per client receiving training/education	NA	\$373	\$18	\$1,770
Cost per hour of training/education	NA	\$79	\$21	\$8,337
Cost per client receiving support services	\$821	\$397	\$16	\$2,052
Cost per client placed (entered employment)	NA	\$807	\$92	\$8,401

Table III-5 shows the volume of service produced at this OneStop. Overall data indicate that this OneStop is slightly below the median benchmark in terms of the number of clients served, but it far exceeds the benchmarks in the amount of services provided. For example this OneStop served 4,557 job seekers during the year, compared to a benchmark median of 7,904. But this OneStop developed 2,148 Individual Employment Plans (IEPs) compared to a benchmark of only 1,276. Similarly this OneStop provided case management to 3,962 clients compared to a benchmark of 1,576. So once again these data reflect the more intensive services delivered under the ISD model.

Table III-5: Big City Units of Job Seeker Service with Benchmarks 2008-09

OneStop Unit of Service Produced	OneStop Number	Benchmark Median Number	Benchmark Low Number	Benchmark High Number
Total Number of individual Job Seekers served (Enrolled Client + Universal Clients. Unique individuals)	4557	7904	757	40000
Number of new Job Seekers	4557	4992	500	9884
Number of Job Seekers visits	4878	27855	2557	120000
Number of Job Seeker Service Events (e.g. faxed a resume, accessed career information on internet)	14634	32445	2557	94050
Number of times one-on-one coaching events occur	3175	6742	971	40000
# of Workshops	208	227	9	800
# of People attending	3120	2901	100	13391
# Job club or network members	NA	128	34	1276
Total Job club or network attendance	NA	300	100	1276
# of Job Seekers completing comprehensive assessments	893	330	36	6104
# of IEPs or other formal plans	2148	1276	166	8250
# of clients getting case management	3962	1576	185	6659

OneStop Unit of Service Produced	OneStop Number	Benchmark Median Number	Benchmark Low Number	Benchmark High Number
# of meetings with case manager (staff/ client ratio may be a meaningfull measure as well)	11886	3000	3	11886
# of client session	NA	391	2	5000
# of clients with ITA or OJT	253	174	36	2062
# of clients receiving training/education	NA	194	51	1661
# of hours of training/ education	NA	600	8	26576
# of clients receiving support services	375	303	31	870
# of clients placed (entered employment)	NA	111	29	4352

Business services accounted for about 5.5 % of total costs or about \$257,000. This is close in both cases to the median in the benchmark group. Outreach to businesses, job development and workshops for businesses are the high cost items.

Table III-6: Big City Cost of Business Services with Benchmarks 2008-09

	OneStop Cost	Benchmark Median	Benchmark Low	Benchmark High	
Business Services Total Cost	\$255,141	\$257,249	\$8,836	\$1,349,880	
Percentage of OneStop Total Costs:	5.5%	7.7%	1.8%	43.7%	
Cost Per Activity	OneStop Dollar Cost	OneStop Percent of Total Cost	Benchmark Median Percent of Costs	Benchmark Low Percent of Costs	Benchmark High Percent of Costs
Outreach and Marketing	\$78,379	1.7%	1.4%	0.3%	8.7%
Rapid Response Assistance	\$20,002	0.4%	1.3%	0.08%	8.7%
Mass Hires/ Job Fairs	\$5,000	0.1%	1.1%	0.06%	9%
Workshops	\$73,379	1.6%	0.1%	0.01%	1.6%
Business Consulting	\$0.00	0.00%	0.3%	0.06%	1.5%
Business Center Service	\$0.00	0.00%	0.4%	0.01%	0.9%
Job Development	\$78,379	1.7%	2.0%	0.3%	21.8%
<i>All Business Services Activities</i>	<i>\$255,141</i>	<i>5.5%</i>	<i>7.7%</i>	<i>1.8%</i>	<i>43.7%</i>

This OneStop does not report extensive data on business services so the cost of activity analysis is partial. In fact, for some activities such as job development where substantial costs are reported, there is little or no data on services produced. As Table III-7 indicates, the cost of contacting and recruiting employers is relatively high, while the cost of actually delivering services tends to be low.

Table III-7: Big City Cost per Unit of Job Seeker Service with Benchmarks 2008-09

Cost Per Unit of Service	OneStop Dollar Cost Per Unit	Benchmark Median Cost Per Unit of Service	Benchmark Low Cost Per Unit of Service	Benchmark High Cost Per Unit of Service
Cost per employer contacted	\$622	\$95	\$11	\$681
Cost per employee assisted	\$5.71	\$29	\$1.10	\$786
Cost per employer assisted	\$229	\$1,175	\$100	\$19,652
Cost per mass hire event	\$69	\$5,182	\$69	\$38,747
Cost per applicant interviewed at mass hire events	NA	\$112	\$3.06	\$1,703
Cost per applicant hired from mass hires events	NA	\$491	\$27	\$8,516
Cost per Job Fair	\$5,000	\$8,978	\$452	\$80,091
Cost per company participating	\$333	\$614	\$11	\$8,009
Cost per Job seeker participating in job fair	NA	\$95	\$2.64	\$425
Cost per workshop	NA	\$793	\$296	\$5,557
Cost per business attending workshop with consultation	NA	\$308	\$14	\$854
Cost per company serviced	NA	\$94	\$27	\$1,762
Cost per hour of consulting	NA	\$59	\$34	\$293
Cost per business served	NA	\$206	\$15	\$1,619.55
Cost per job developed	NA	\$418	\$133	\$1,345

Available data on activities shows that this OneStop tends to provide more business services than the benchmark group. For example the OneStop reports serving 87 employers in 2008-09 compared to a benchmark median of 26.

Table III-8: Big City Number of Business Services with Benchmarks 2008-09

Unit of Service Produced	Your Number	Median Number	Low Number	High Number
Number of employers contacted	126	180	80	3015
Number of employees assisted	3500	2000	207	13069
Number of employers assisted	87	26	2	180
Number of mass hire events	72	10	3	72
Number of applicants interviewed at mass hire events	NA	403	75	3100
Number of applicants hired from mass hires events	NA	100	15	350
Number of Job Fairs	1	7	1	21
Number of companies participating	15	50	10	840
# of Job seekers participating in job fair	NA	387	200	3600
# of workshops	NA	6	1	20
# of businesses attending	NA	50	11	320
# of companies serviced	NA	130	10	3038
# of hours of consulting	NA	160	60	360
Number of businesses served	87	53	1	180
Number of jobs developed	NA	173	50	4800

Lessons Learned

ISD implementation is a success at Big City OneStop in the sense that EDD and WIA staff work collaboratively. Both agencies have shared sense of purpose and recognize the constraints each partner faces. The success at this OneStop appears to be part of a larger success story in that it seems that ISD was implemented successfully at all this local area's OneStops. In our case study we found that all phases of the customer service process were well integrated. There was a common mission and both groups felt responsibility for all the clients. In the OneStop one could not tell EDD from WIA staff. The question addressed here is why was Integrated Service Delivery a success at this site. We see three key reasons.

First, everyone we talked to noted that EDD and the local WIA program had a long history of successful cooperation *before* ISD. Most OneStops had been co-located with EDD for several years. Managers pointed out that there was often a great deal of informal collaboration and willingness on both sides to overcome the bureaucratic hurdles that often make collaboration difficult. We learned that at least one senior WIA manager had previously worked for EDD and some senior EDD managers had worked in a WIA agency. Thus, key managers had a deep understanding of their partner's programs. Managers at the case study OneStop also appeared to have a strong positive personal relationship that preceded ISD. Their positive relationship served as a role model for the staff on how to collaborate and problem solve.

Second, the local area has a strategic planning process that is taken seriously and a strong sense of mission that appears to drive the organization. ISD was a good fit for the local area's mission and strategy and that led to strong commitment by senior management to make integration work. The local area takes pride in being a well-run modern organization and once it committed to ISD it made the effort necessary for it to be a success. We particularly note the high involvement, year-long planning process that produced the ISD design specific to this local area. It seems that this planning process built positive relationships at every level and created a strong foundation that allowed the organization to survive the difficult implementation period. The continued drive to improve ISD through the ISD Phase II initiative shows a continued commitment to collaboration and innovation.

Third, is what we came to call the "symmetry" between WIA and EDD at the case study site. Both agencies had large staffs and hence enough people so that staff from both agencies could be involved in all phases of the customer service process. One agency did not dominate the other. Perhaps more importantly the presence of both senior WIA and senior EDD managers at the OneStop seemed to be a key ingredient for success. This meant that there really was a "management team" led by two equally powerful managers who were on site every day. This made for constant easy communication between the managers. When problems emerged they could be solved quickly at the site. EDD staff did not have to go to a manager who was located at another site and perhaps not in touch with the day-to-day operation of the OneStop to get a decision made or a dispute resolved, as happened at some other sites. Managers supported each other and sent a common message about the goals and importance of ISD.

We would not expect an organizational change of this magnitude to be problem free. In this case study we found some aspects of ISD at this site to be problematic.

We found that some aspects of the process were not customer friendly. The wait of days for an orientation, and need to come hours early to insure a spot in orientation, struck us as a process that was not designed with the customer in mind. The focus of orientation on filling in forms and being lectured about internal rules and procedures, in our view, took the focus off helping the customer find a job and did not set a positive tone. The practice of doing intake interviews with clients in an open room within the easy hearing of others made some clients uncomfortable and did not send a message that client confidentiality was valued. In short, the entire orientation and registration process seemed more about bureaucratic process than welcoming the client. That said, once clients were in the system we found that the staff were very helpful to clients and the research library services and assistance were readily available.

The amount of both client and staff time consumed by data entry seems inordinate to us. We found that a typical staff person was scheduled half a day a week (10% of their work week) just to “catch up” on data entry. In addition data entry also took some of their time every day. The practice of having staff do all the data entry and having clients fill in all the data on forms struck us as inefficient. Having all client data entered twice into both CISRS and CalJobs seems unnecessarily redundant. The irony is, despite this effort, the system still does not seem to contain a single complete count of number of clients served. The large number of clients served in the lobby area is not counted and hence despite all this effort the OneStop still does not have a complete count of the number of people served. We must add that the local staff is aware of these problems and discussed them frankly with us. The ongoing effort to redesign integration is working to address these issues.

Finally, we found this OneStop was not driven by Federal performance measures. As noted earlier managers did not even receive reports on how their centers had done on Federal performance measures. Rather, managers were more focused on the number of people served and the number who received training. These measures align with local priorities but, in the long run, lack of focus on federal performance standards may have significant implications for the larger state system.

Finally, we were surprised that the whole ISD reform was launched with a great deal of planning and work, but did not have a clear set of measureable goals for the initiative. So for example, a key idea was to provide more services to people but no specific way to measure this outcome was set up.

IV: CVRural Case
“To Potluck or Not to Potluck”

CVRural Case “To Potluck or Not to Potluck ”

An Integration Microcosm

CVRural is a rural, Central Valley OneStop that volunteered to be a Learning Lab in the first year of the Integrated Service Delivery (ISD) initiative. CVRural is relatively small, but it serves as an ISD microcosm and illuminates many of the characteristics that promote and hinder the delivery of integrated services.

In the absence of a local commercial airport, you approach CVRural on the interstate highway. As you approach on the east and west horizons loom majestic mountains. Both sides of the interstate are dominated by large agricultural fields. The major businesses along the interstate are large, agricultural implement or irrigation dealerships. This is the heart of California's Central Valley.

Exiting the interstate we weave through a federally funded highway improvement and enter a well-kept residential section. After about a mile we encounter a traditional central city park, surrounded by government offices. Passing through two central city business blocks, we spot the CVRural site. The site is a rectangular structure, built on a former car dealership site. The site is leased by the local Workforce Investment Act (WIA), with subleases to OneStop partners. On entering the site we note the internal walls and that the only way to enter the site is through the main reception area. The site was originally designed as one, large open area in which all partners combined their activities. However, the OneStop partners desired some privacy and walls were eventually constructed. The many walls and limited access through the reception area did not bode well for integrated service delivery.

The Site Overview

Within the CVRural building, the WIA staff is located in a large, open area in the rear half of the structure. The Employment Development Department (EDD) staff is housed in the front left corner of the structure. These two areas are separated, with the only connection through the front, reception area. Integrated Service Delivery is provided in two segments, a Welcome Team that greets and orients the clients, and training and skills development team that provides evaluation and case management.

The Welcome team demonstrates many of the characteristics of successful integration. Both WIA and EDD staff share a common goal of making the client feel welcome, registering them in the system, and directing the client into the hands of someone capable of helping them. For the Welcome Team, WIA staff was physically moved into the EDD area of the site. In addition, both WIA and EDD have Welcome Team supervisors who are perceived to be at the same level. The common goals, along with co-location of staff and supervision, have promoted integration and that continued well beyond the Learning Lab period.

The training and skills development area encountered some difficulties. The Training and skills development team was originally located in cubicles in the WIA area of the site. EDD

staff members physically moved from the EDD area into the WIA space. However, management for this segment was not co-located. WIA staff had management on site. EDD staff was managed from a regional headquarters located in another county. In addition, the training and skills development team members did not share a common goal. In essence the EDD staff integrated into the WIA program. However, EDD activities and goals were not part of the integration. EDD staff continued to provide services to farm workers, provide unemployment insurance (UI) services and information, and help with employee pay problems, along with helping WIA provide its training and skills development activities. But WIA staff did not take on any EDD activities. The lack of a common goal and separation of management from staff hindered the integration process.

The Context

The CVRural is the only comprehensive OneStop in this small Local WIA program. The Local WIA program serves a county with a predominantly rural population. The county population is about 150,000, with over one-third living in the one large city within the county. The local economy was severely damaged by the 2008 recession. While 2009 unemployment for California hovered between 10 and 12 percent, unemployment in the county was between 13 and 15 percent.ⁱ Almost one-fourth of county employment is farm related. Other large employment sources are government and education. The CVRural OneStop is located in the county's largest city and is housed in a relatively large building that has been subdivided to provide space for the various partner agencies.

The CV Rural OneStop has housed many organizations. These organizations include the local Workforce Investment Act(WIA) program, the Employment Development Department (EDD), the National Guard, the local Opportunity Center, the Department of Social Services, the local county Adult School, the Community College, SER Jobs for Progress , and the "Ready, Set, Go!" youth program. The 2008 recession has significantly impacted services at this site. The rise in unemployment has expanded the activities of WIA and EDD. However, budget cuts have caused most of the other organizations to reduce or eliminate their presence at the CVRural OneStop. The youth program remains and Social Services continue a presence with occasional visits.

The space is leased by the WIA and space is sublet to OneStop partners. As part of the sub-lease arrangement, all OneStop partners provide some coverage of the reception desk. The largest occupant is the WIA with 28 employees. EDD has 8 full-time equivalent employees. The County Office of Education is the operating entity for WIA in this local area. This means that CVRural WIA staff are employees of the County Office of Education. This organizational structure does affect the policies and compensation for the WIA segment of the OneStop.

Local WIA

The local WIA program is outcomes driven. As stated in its mission, "the WIA program is dedicated to providing quality services to our Community, leading to successful outcomes and customer satisfaction." The CVRural's WIA program is an active, innovative operation that prides itself in being flexible and willing to try new things. The WIA Director has worked in the

center for five years and is considered to have a strong personality, is highly motivated to continually improve services. The Director is willing to quickly embrace new ideas or programs that are seen to bring value and increased credibility to the operation. The WIA staff understands this leadership style and is more than willing to follow any direction that is set. The WIA staff has a high longevity, with very few staff members having less than four years of service and a number more than twenty. WIA at CVRural has a strategy designed to optimize the use of its training funds. Following Workforce Investment Board (WIB) policy, participants must have at least a high school diploma or the equivalent General Educational Development (GED) certification to receive training services. This local policy has the effect of dramatically restricting training access to a subset of those coming to the OneStop seeking services.

Since the WIA is operated through the County Office of Education, education is valued and rewarded. For example, promotions and pay increases are often tied to educational achievements.

The EDD employees at the CVRural OneStop have an on-site local supervisor. In addition to the seven staff positions, this individual also supervises two or three other, smaller off OneStop locations. But this supervisor is not viewed as at an equal level with the WIA Director. That level of oversight is at the regional level, provided by EDD manager who is literally located in another county. Employee turnover at EDD is fairly high. In 2010, only one staff member remained from the start of the Integrated Service Delivery implementation. EDD staff sees themselves as providing services to the broad range of individuals entering the OneStop, be it for Unemployment Insurance (UI) information or validation or for access to employment opportunities. This creates tension with the restricted access provided through WIA funds.

Integrated Service Delivery (ISD) was implemented at the CVRural OneStop on July 1, 2008. The integration included only the two largest occupants of the OneStop, WIA and EDD. ISD at the CVRural OneStop went through an evolutionary process. In order to better understand how ISD ultimately emerged, this case will start with a timeline of the development and evolution of the integrated service delivery process. We will then discuss the characteristics and perceptions of the integration partners and the circumstances each of the partners faced. We chose this format because it clarifies the benefits and difficulties encountered in the process. We will conclude with lessons learned from this case study.

Integrated Service Delivery Development

The ISD development started in June 2007 when the county WIB was informed about possible participation as a Learning Lab in the development of Integrated Service Delivery (ISD). The WIA Director participated in the initial discussions in Sacramento and believed it was a great opportunity to improve efficiency and make better use of resources. The WIA staff met on several occasions to discuss the possibility of integrating services and came forward with widespread support for the project. Several members of WIA staff saw the integration as “providing more hands to help us with our work.” The local WIB approved participation as a Learning Lab in December 2007.

The decision to become an Integrated Service Delivery site was made by the WIA partner. Once WIA came forward as a participant in the integration project, the EDD staff was informed that they would participate as a partner. EDD's participation in the integration activity was decided by regional managers, not located at the CVRural site. The decision to integrate EDD was not made with local EDD staff consultation. Once informed that they would integrate, the local EDD staff did actively participate in the integration planning and activities.

Over spring 2008, the WIA Director met numerous times with regional managers from EDD to develop the Integrated Service Delivery model for CVRural. The regional EDD managers were not located at the CVRural site and, thus, could not participate in the day-to-day onsite activities, nor immediately respond to and provide input to problems that would arise. The local model followed the functional design provided in the Greg Newton model with a Welcome Team and a Skills Team and Employment Team. At this OneStop, the later team is referred to as the BEST Team (**B**usiness **E**mployment and **S**kills **T**eam). The Welcome and Best teams also collectively met at numerous times.

The Welcome and BEST teams were both comprised of both WIA and EDD staff. However, given the size differentials, relatively more WIA staff were involved. The supervision of the Welcome and BEST teams came at different levels. The Welcome team was supervised by a local WIA Employment and Training Supervisor and the local EDD supervisor. Both participants saw this supervision at about the same managerial level. The BEST Team and the overall integration activity were supervised by the OneStop Manager and a regional EDD manager. The EDD manager was not at the local site. The teams worked well together and, through numerous meetings throughout the spring, developed flow charts to define the process of integrated service delivery. During this development period (Spring 2007) the WIA staff and EDD staff developed a good working relationship and started to integrate social activities (see text box IV-1). The process was designed as a "high touch" process and moved away from the prior period's process of bringing individuals in, registering them, putting them into group orientation sessions, then screening for the use of universal services (phones, fax, computers, online job postings, etc.), followed by movement for those who met enrollment criteria to assignment of a case worker.

Text Box IV-1: Potluck

As is the case for many church and close knit social groups in the Midwest, at CVRural potluck is used as a verb. For example, “We potluck at least once a month, usually on Friday.” Potlucking is part of the social structure of the WIA organization and is an outward manifestation of the organization’s climate.¹¹ WIA staff has a long history of getting together at least once a month to break bread together and socialize. Each staff member brings something, an entree, desert, drink or whatever to be shared in the common area amongst all the WIA staff. This shared lunch goes back as far as anyone currently employed there can remember. Generally some occasion is found to celebrate and create a theme. Typical choices are July Fourth, the coming of spring, a collective birthday, a wedding or, in the absence of any obvious choice, “just because, as is just because we haven’t had one in a while.”

The potluck is a social event that helps cement relationships, permits communication in a nonthreatening setting, and builds bonds between staff members. Social activities, such as these potlucks, bubble up from the staff. However, it is so embedded into WIA staff culture that it has become an agenda item at monthly staff meetings. Historically, the potlucks were WIA staff only. However, on significant occasions, members of other organizations located at the OneStop would be invited to participate.

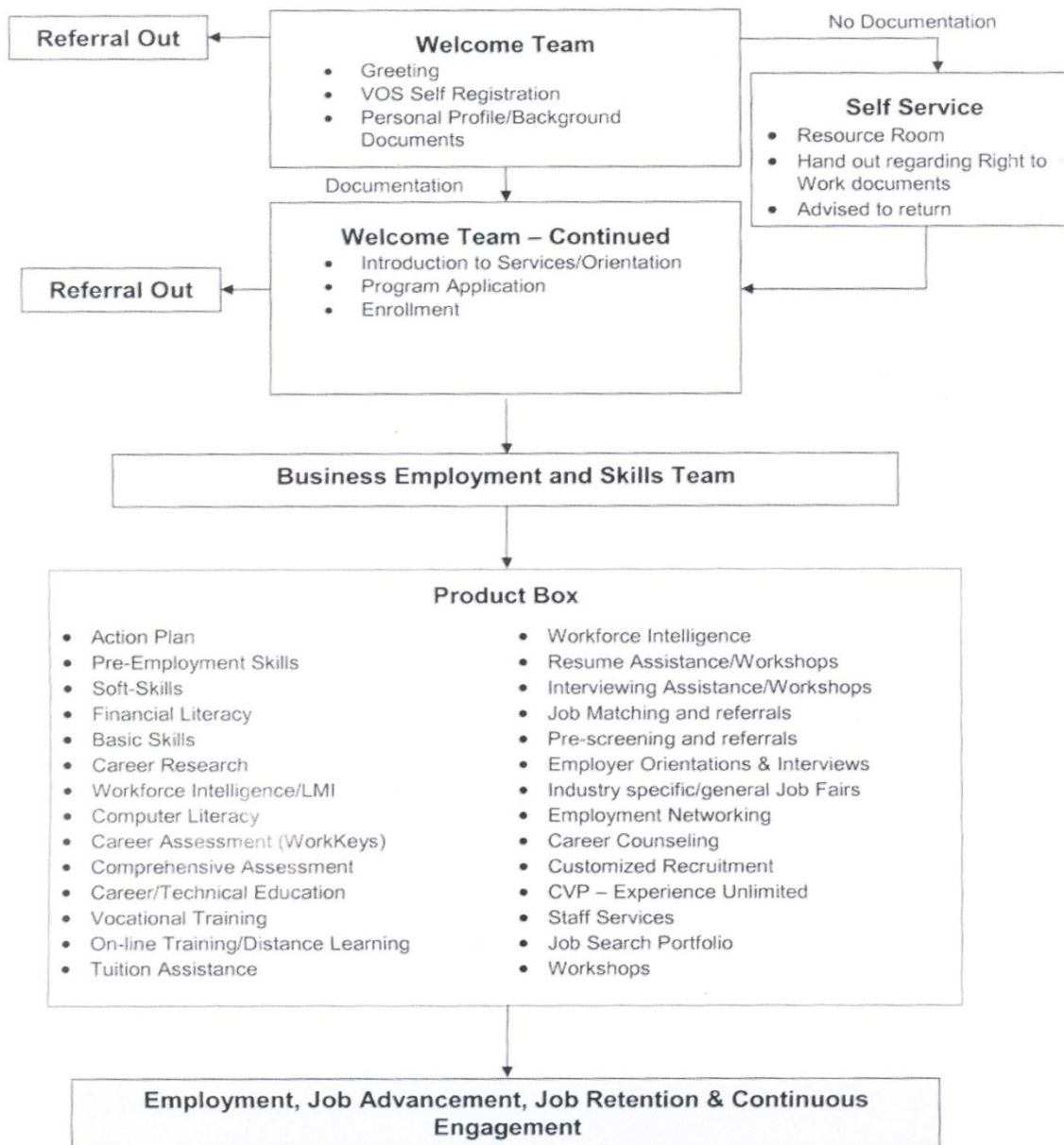
When the ISD was developed in spring 2008, the WIA and EDD staffs were working closely together. The teamwork necessary to design the new delivery system started to develop social bonds and the EDD staff members were invited to and chose to participate in the WIA potluck activities. This communal bread breaking started in spring 2008 and continued into the fall.

During the fall 2008, differences in supervisory approaches between WIA and EDD began to surface and differences in each participant’s view of their different roles and mandates emerged. This created tension among team members. Shortly after the December 2008 holiday season, this tension emerged with a decline in EDD participation in the potlucks. Relationships further eroded and an influx of America Recovery Act (ARA) funds provided for a restructuring of the BEST team. The EDD staff members were moved back into the EDD area and the BEST team’s activities were assigned to WIA staff as WIA controlled the distribution of the recently arrived ARA training funds. As one staff member put it, “We don’t potluck anymore.”

¹¹ Denison (1996, p. 624) describes an organization’s climate as “those aspects of a social environment that are consciously perceived by organizational members.” It is a surface-level manifestation that reflects underlying values.

During the development period the Welcome and BEST teams had a few trial runs during which the process was tested for a day to see how the flow worked. The Learning Lab was officially launched July 1, 2008. The initial customer flowchart is given as *flow chart V-1*. The customer is greeted by a member of the Welcome Team, given help and guidance on computer registration into CVRural's Virtual OneStop System (VOS). Since the services were to move into a paperless environment, required documents (right to work, selective service, etc.) were checked and recorded, but not filed away. If the client lacked required documentation, the Welcome Team directed the customer to self-service materials in the Resource Room and advised them to return with necessary documentation. Others with specific Unemployment Insurance or employment complaint questions were referred to EDD staff. Some had their questions answered or were referred out. Most of the individuals with UI questions were registered into the VOS system. However, they often did not continue with the process and move to enroll in the WIA program. For those with an interest beyond having a UI question answered, the Welcome Team continued with an orientation to the services available and the customer would be enrolled in the center.

Flow Chart IV-1: CVRural – Customer Process Chart



TSC 06/18/08

Following enrollment the customer was hand delivered to a member of the BEST Team, in what staff call a “warm hand-off”. Initially, WIA and EDD employees were both assigned to the BEST Team and the customer was handed off to the next available team member on a rotation schedule. Each day, one member of the BEST Team was assigned to manage the customer flow and designated which team member would receive the next customer. Once given to a BEST team member, the customer was assessed for basic skills and given a career assessment through WorkKeys. If the customer did not have the required GED or higher level of education, the customer was referred to the local adult school or the GED classes that are conducted at the OneStop. Without the equivalence of a high school diploma, a client was not

eligible for training services or other activities, beyond the GED courses, for which WIA needed to make an explicit payment. Without GED evidence, WIA would provide assistance with fees and books for a GED course. If all documents were in place, the client was passed to a BEST team member. The client then became part of the staff member's caseload and would, if possible, be seen by the same staff member on follow up meetings.

The BEST team member would assess the customer for basic skills and complete a career assessment (WorkKeys) then counsel the customer on potential next steps in their job search. Next steps could include attending skills development workshops, resume workshops, job matching and referrals, and help with additional training. The BEST team worked with the customers to prepare them with the skills needed by local and regional employers.

The timing of the launch of the Learning Lab (July 1, 2008) immediately brought on unexpected difficulties. Not only was the customer flow moved to greater a "hands on" operation, the rise in unemployment in the local area brought in more than anticipated customers. Both WIA and EDD staff felt overwhelmed by the workload and lacked the time necessary to even enter notes on individual customers into the electronic system. The first significant change in operations was to move to "dark" Fridays. On Fridays, customers who arrived were provided access to self service materials and the resource room, only. They would not be passed on to the BEST team for evaluation and counseling. The staff used this time to update computer files on customers and catch up on other work not directly related to servicing and counseling customers.

Text Box IV-2: OneStop Orientation

Attending orientations helped us develop a feel for the Integrated Service Delivery (ISD) operation. Orientation sessions occur twice a day, Monday through Wednesday. Clients may sign up in advance or simply show up, once registered, and hope for an opening. The orientation sessions are held at 8:30 am and 1:30 pm. Unless the client knows to arrive early enough to attend the 8:30 session, the orientation will usually require spending most of the day or, more likely, a return trip. The orientation room used was relatively small, holding thirteen to fifteen clients. During the learning lab period no orientations were conducted. It was all one-on-one. CVRural soon moved to group orientation sessions to reduce costs.

Clients arrive at the OneStop and wait to see a receptionist. Throughout our visit, the line never seemed long. Usually it was one to two clients. The longest line was eight, right prior to an orientation session. The orientation process actually starts with registration. After checking in with the receptionist, the client is sent to a Welcome Team member. The Welcome Team member helps the client register in the VOS (Virtual OneStop) system. This system is used to electronically track all client and IDS activities. Registration does not mean that the client is enrolled in the IDS OneStop. Registration collects some minimal data, name, social security number, and contact information. Once registered, the client has access to the Resource Room,

phones and faxes, posted information and online postings but is not enrolled in the WIA program.

The orientation started on time. Seven people attended the orientation and there were about 6 empty seats. The attendees looked very young, and most of them had visible tattoos and piercings.¹²

The instructor, a young Spanish speaking woman, encouraged everyone to complete the enrollment process and to check CVRural's Worksource and CalJobs webpages for job openings. Then she briefly described what services each partner (including EDD) provided, told what days other OneStop participants were available, and how to contact them. The orientation session was not very interactive. It provided basic information and did not probe into what the few clients attending were interested in obtaining. Any probing of client intent occurred at follow up meetings.

The instructor explained what eligibility documents were needed for enrollment in WIA and what training the center offered on site and possible training options available locally that the OneStop might help facilitate and maybe provide some financial assistance. Afterwards she mentioned budget cuts and that training funds were low and, therefore training opportunities, might not be available.

In discussions with staff it is evident that information spreads quickly on available training funds and clients expand or contract with movements in available training funds.

Posters with current job openings, (some of the openings were in a nearby State Prison) were distributed. Clients were informed that they would be contacted by a Welcome Team member for a follow-on interview. This interview would collect the information necessary for enrollment and included a review on the required enrollment documents, right to work, selective service, etc. and, a requirement at this OneStop, evidence of a high school diploma or GED. Orientation occurred prior to enrollment as enrollment required a document review. The follow-on interview and review would generally happen within a day or two and, certainly within a week. With a friendly note, she also encouraged people to use the Resource Room.

The processes used by WIA for welcoming, evaluating, and referring customers through the Welcome Team and the BEST Team were integrated. However, the supervision of these activities was not integrated. WIA staff continued to be supervised by WIA management and EDD staff supervised by EDD management. The higher levels of management for EDD were off-site, as noted before. So adjustments in work tasks became difficult to make, because

¹² We later learned that the day of this observation was likely the day that local parolees visited the OneStop.

changes in EDD staff's work needed to be cleared with an off-site supervisor. This lack of supervisory integration started to create tension, especially within the BEST team. For example, an EDD employee might get assigned to some off-site EDD mandated activity such as oversight of required farm worker working conditions- provision of toilets and shade. The BEST Team might not be informed of this change in assignment and the team would be short-handed for the day.

The provision of veteran's services also created some tension. From interviews, both WIA and EDD staff saw the dedicated provision of veteran's services as a desirable and important service. During the Learning Lab period, the number of veterans registered was 2.9 percent of the registered population. EDD had a dedicated staff member assigned to Veteran Services. This position was funded by line items dedicated to veteran services and EDD viewed this position as having effectively an inventory status to be available to provide veteran services on demand. If veterans were not ready and waiting for services, the inventory of services would remain and was not assigned to other tasks. The WIA staff viewed the provision of veteran services as important. However, they also saw this position as potential labor available to provide other services when not called upon to service veterans. This became a supervisory issue that was never resolved between the different management structures of WIA and EDD.

The tensions and difficult working relationships on the BEST team were resolved in early 2009. WIA received an influx of ARRA money for training and felt the need to have more WIA staff involved in allocation these additional funds. EDD also received some ARRA funds and needed to revise services to meet those demands. The BEST team was restructured with the EDD staff members returning to the front area and provided some additional help in the welcome area. Some of the WIA Welcome Team staff members were reassigned to the BEST team. The BEST team became entirely WIA staff and the integration of counseling and assessment activities ended and returned to sole ownership by WIA.

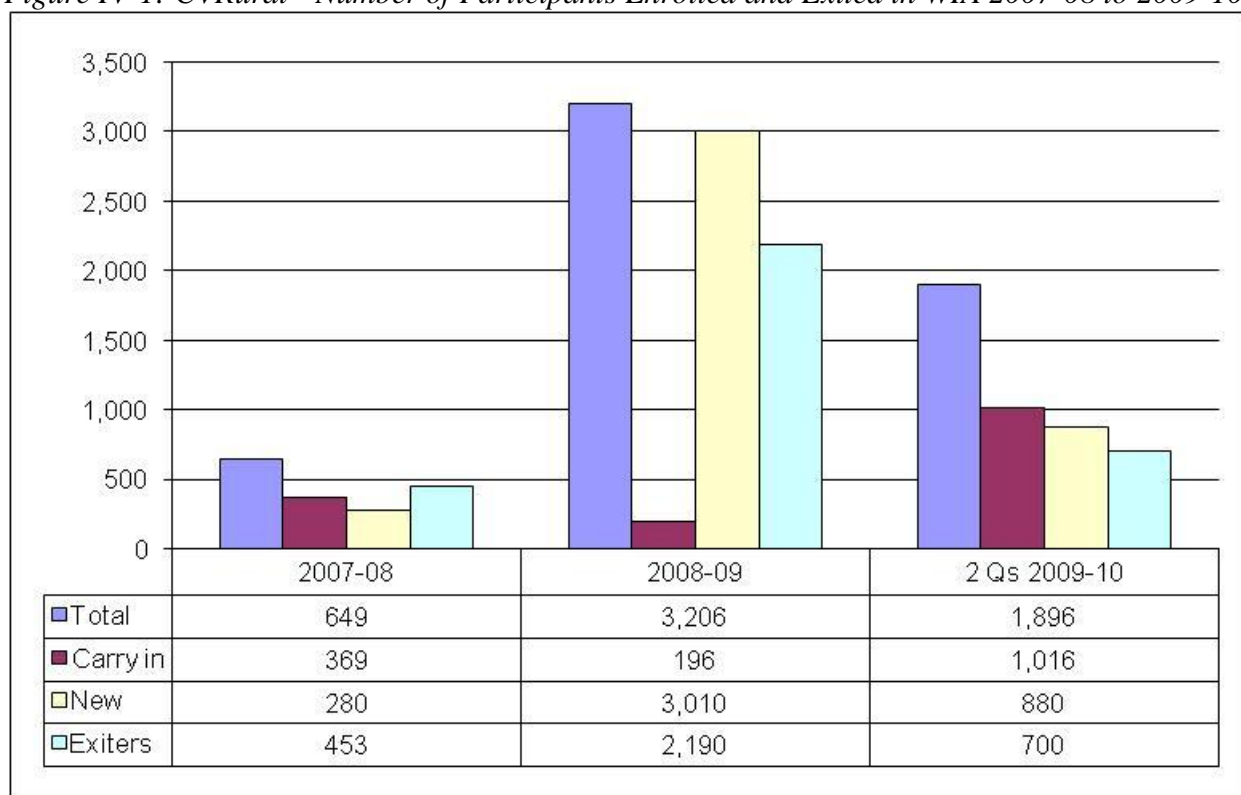
The customer workflow established in early 2009 continued through the remainder of the Learning Lab period and was still maintained into 2010. Customers are greeted by a member of the Welcome team. The customer is registered into the VOS system and required documents reviewed and collected. The customer is then referred to EDD for UI matters or other EDD specific services, self service for those not eligible for training services, or to the BEST team for further evaluation, counseling, and potential training, assuming that training funds are available. During the Learning Lab period, all workshops and orientation session were conducted by WIA staff. These workshops included resume assistance, interviewing skills, financial and computer skills. During the last half of the Learning Lab period, EDD started to provide some EDD specific workshops. These were conducted by EDD staff from other locations, not CV Rural. These workshops are directly related to EDD services and mandated activities.

Both EDD and WIA provide business services. Generally these involved contacting local employers to ensure job postings and help in contacting potential employees. The business service activities did not appear as a significant part of the integration process. The local EDD and WIA seem to have already divided up the local businesses for service and avoided duplication of efforts.

ISD and Service Delivery

Figure IV-1 below shows the tremendous growth the WIA program went through with the implementation of ISD in 2008-09. In the year prior to the Learning Lab, WIA had 280 new enrollees. In the Learning Lab year, with the implementation of ISD, WIA new enrollments increased to 3,010. This is almost a 1,000 percent increase. This increased level of participation looks to continue into 2009-10, albeit at a lower level. The growth was substantial. It is difficult, however, to separate out the growth in participation that resulted from the implementation of ISD and growth resulting from the economic downturn with the resulting increase in unemployment and increased difficulty in obtaining employment. These data are from state JTA records and the growth is consistent with that observed at other ISD OneStops.

Figure IV-1: CVRural - Number of Participants Enrolled and Exited in WIA 2007-08 to 2009-10



One concern we had in the movement into the Learning Lab and enrollment of all was that some participants might choose to walk away rather than provide the information necessary for enrollment and enter their data into the electronic system. While the data for the prior year (2007-08) has some problems related to the conversion into the VOS system, it looks as if some individuals did decide to abstain from services. The number of distinct individuals receiving services at CVRural, whether they were enrolled in WIA or not, in 2007-08 was 8,895. This number fell to 7,671 in 2008-09 and was at 7,356 through May of 2009.

Figure IV-2: CVRural Number of Distinct Individuals Served

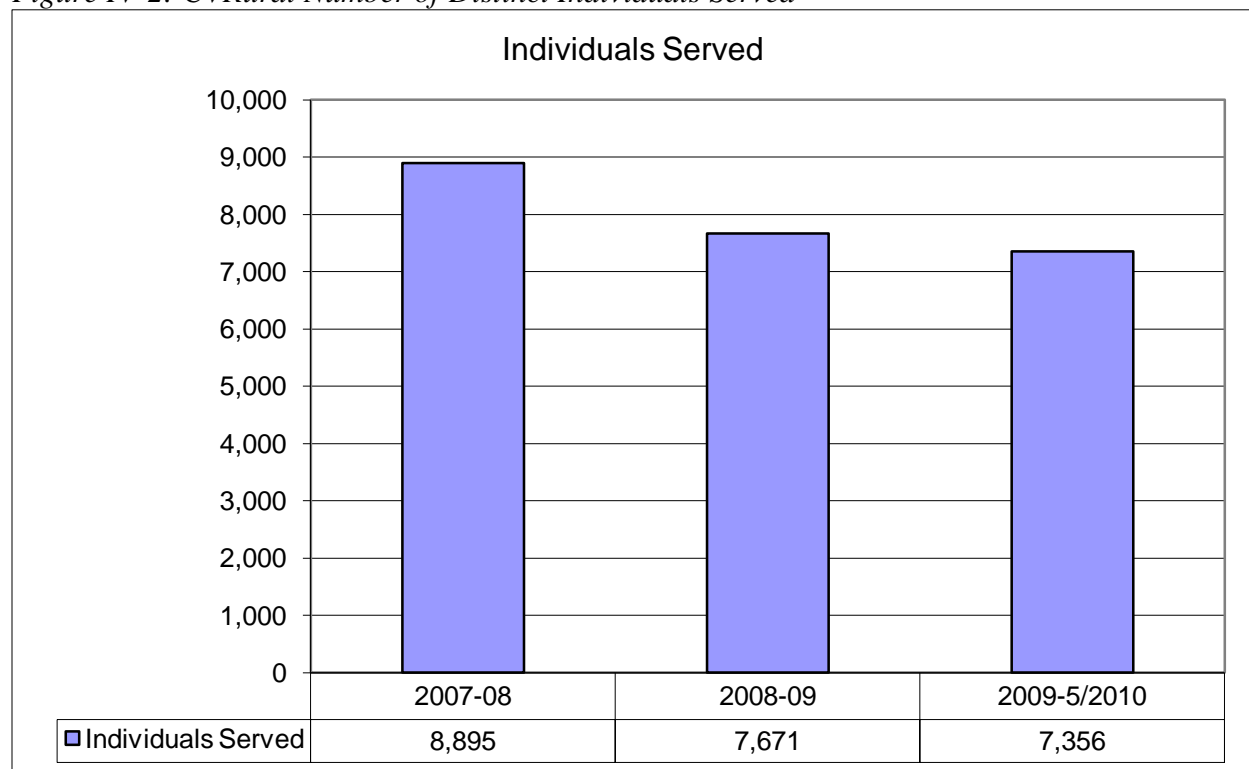
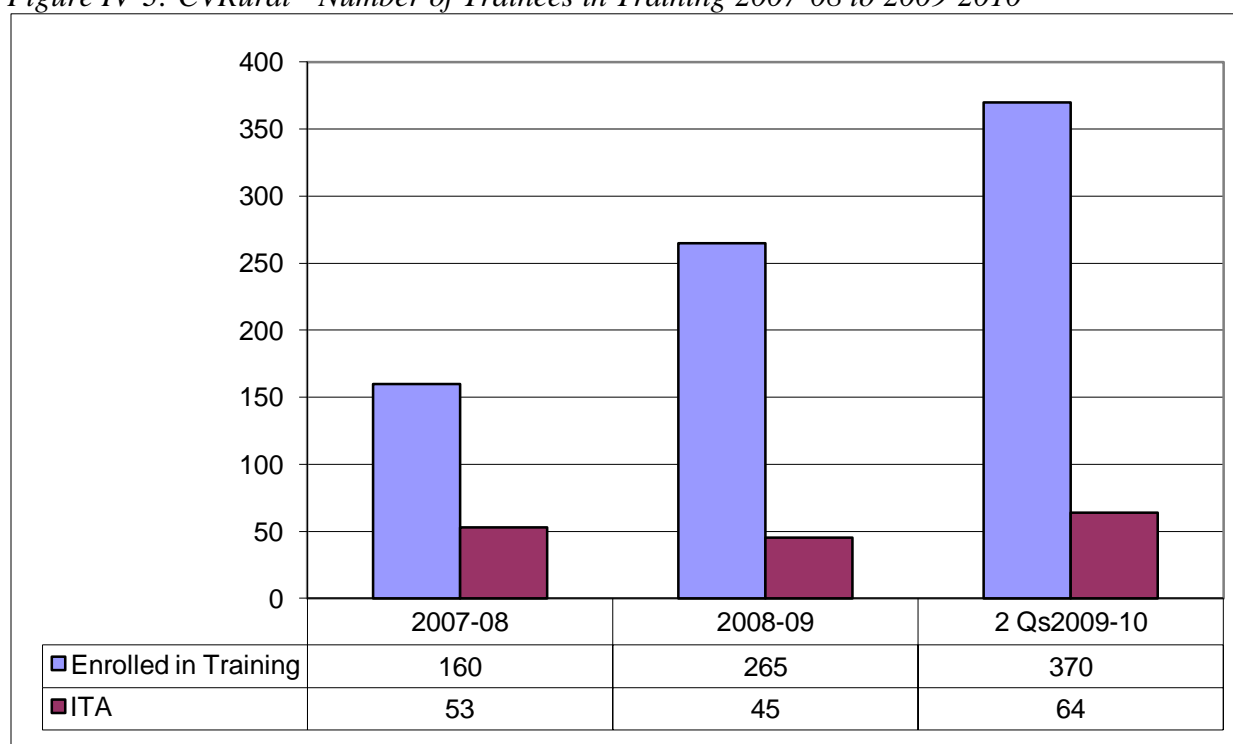


Figure IV-3 provides data on training activities. Since the mission of CVRural is directed at outcomes, training is likely to be a significant component of CVRural's activities. It is evident that training activities grew as dramatically as participation. There is, however, little evidence of increases in Individual Training Activities (ITA). ITAs are, essentially, vouchers for training. The relatively small size of the area, limited availability of training opportunities, and funding are likely major contributors to the minimal changes in ITAs. More importantly, WIA was operating under a model calling for skills upgrades and enhancement, rather than implementing training programs.

Figure IV-3: CVRural - Number of Trainees in Training 2007-08 to 2009-2010

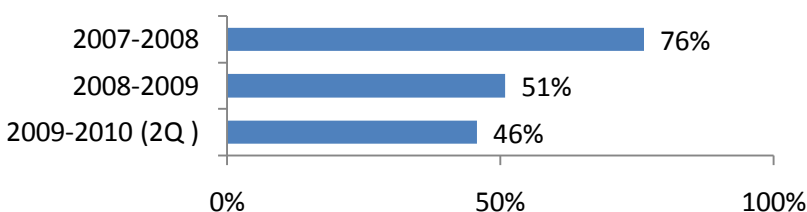


ISD and Performance

Performance measures typically associated with WIA/EDD activities range around finding jobs, retaining those jobs and earnings. If funding is closely tied to such performance measures, there is an incentive to selectively provide service to those more likely to get and keep a job and enter those jobs with higher earnings, a strategy commonly called “creaming”. Enrollment of a broader range of individuals, as is a goal of ISD, is likely to reduce performance on these measures. As expected, the figures below for adult and dislocated workers at CVRural show a decline in the Federal performance measures.

Figure IV-4 indicates that the entered employment rate fell from 76 percent in the year prior to the Learning Lab to 51 percent in the Learning Lab year and to 46 percent in the first two quarters of 2009-10. We cannot determine how much of this decline is related to the move towards more universal enrollment or is driven by the economic downturn. Also, it should be noted that there are significant lags in reporting employment data. As such, many of those reported as entering employment were likely served in the prior periods and may reflect activity and services provided in earlier years, rather than in the year reported.

Figure IV- 4: CVRural Entered Employment Rate for Adult and Dislocated Workers 2007-08 to 2009-10



Retention in employment shows a pattern similar to that of entering employment. As is seen in Figure IV-5, retention in employment fell from 84 percent in 2007-08 to 75 percent during the Learning Lab year and further declined to 66 percent in the first two quarters of 2009-10. Given that these data reflect the on set of recession we can tell how much of the change is due to ISD and how much is due to the recession.

Figure IV-5: CVRural Retained in Employment for Adult and Dislocated Workers 2007-08 to 2009-10

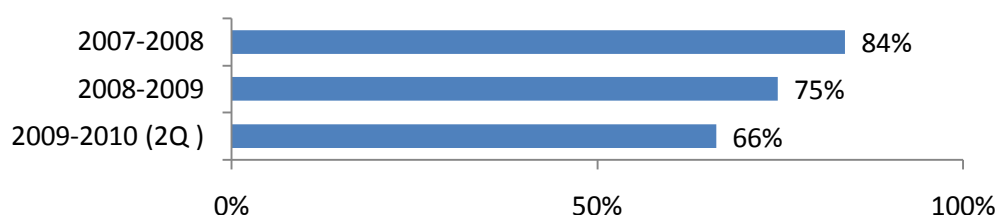
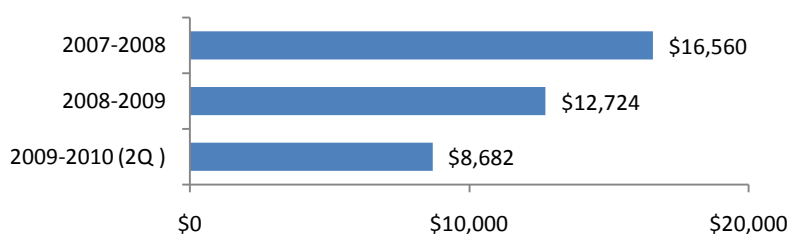


Figure IV-6 shows that there is a similar pattern on earnings measures. Earnings declined from \$16,560 in the 2007-08 period to \$8,682 in the first two quarters of 2009-10. In order to evaluate the impact of expanded enrollment on these performance figures, a comparison between ISD OneStops and like OneStops that are not integrated and did not move towards more universal enrollment is necessary. This analysis will be conducted in a later phase of this study.

Figure IV-6: CVRural Earnings Measure for Adult and Dislocated Workers 2007-08 to 2009-10



Integration – Implementation Challenges, Barriers, & Issues

Integrating services is generally more difficult than is expected. Integration often requires doing more than was done before and the additional activities can only be accomplished with either additional resources or finding resource saving activities or a reduction in duplication in other services provided. The one area generally suggested for resource saving is in the area of business services. Both WIA and EDD call on local employers in the attempt to develop

employment opportunities. While business services continued during the learning lab period, it is unclear whether or not integration of this activity occurred prior to or during the integration period. By integrating this business service activity, fewer resources would be used, releasing those resources to help staff the integration process. Unfortunately, gains from this integration activity are minimal, at best. Apparently, local EDD and WIA had, prior to the integration period, already coordinated this activity. In addition, with few large employers in the area, business service development had limited impact. Prior to integration, each agency had their clients and a clear understanding on who was to call on whom. Duplication seemed to have been already eliminated and no additional savings were available.

Without a resource gain from reduced duplication in business services, there is no clear source benefits that could increase productivity. More individuals were enrolled in the system and provided services. What we did find was a uniform feeling expressed that all participants were working harder.

Potential obstacles to integrating WIA and EDD services at CVRural generally fall into three areas: organizational philosophy, organizational culture, and the data systems.

Organizational Philosophy

WIA and EDD staffs differ in their views of the goals of the operation. The WIA staff sees themselves as improving the skills and attributes of their customers to make them eligible for job advancement and better job placement. The WIA staff tends to take a longer-term view of the operation. While it would be nice to find immediate job placement, it is seen as better to work on a client's job skills and work towards a placement that has better future prospects and possible advancement. The WIA staff seems to place a high value on security and longevity. Most of the staff has been employed by WIA for over five years. The organization is relatively flat and job advancement comes through service time and acquiring additional skills through advanced education. Earning a higher level degree, such as a Masters, leads to increases in pay. Added skills pay off in this environment and that spills over into the WIA staff's view of their contribution to workforce improvement. One of the key services WIA provides is job training.

This longer-term view is also likely linked to historical rewards in WIA services. Historically WIA's funding came from the number of individuals served and measures of successful performance. The performance measures looked at numbers placed in jobs, retained employment for a period, and improvement in earnings. These performance measures put strong emphasis on longer-term successes. While the State has promised to hold Learning Labs "blameless" on performance measures during the integration process, those measures still remain in the background and training of the WIA staff exert a likely influence on the staff's world view.

EDD staff is accustomed to a standardized set of procedures and have a much shorter time horizon than WIA staff. Promotion and job advancement for EDD staff comes through movement to a new, larger site. EDD staff is subject to a broad range of mandated activities, e.g., UI claims, worker payment complaints, and monitoring farm worker conditions. These are all immediate problems and require an immediate response. In dealing with unemployed

customers, EDD sees their role as helping to obtain immediate reemployment, rather than a longer term fix of improved job skills and better employment prospects. The short-term view is reinforced by the employment and job movement structure at EDD. The longest term employee for EDD at the CVRural OneStop had been there only three years.

The mandated activities of EDD were seen by both EDD and WIA as proprietary to EDD. EDD staff would be cross trained on WIA activities, but WIA would not encroach upon EDD activities. For example, if an UI question would arise, it would wait for an EDD staff member to respond. The UI area was seen as so complex that any cross training would be too costly to be useful. This view was reinforced by EDD moving UI question to a central response system. More often than not, a UI claim question received the response of “We have dedicated phone lines to answer your question, please use one of these phones.”

Organizational Culture

WIA and EDD staffs come from different backgrounds and different organizational structures. EDD is a large, bureaucratic organization. It is run out of Sacramento and is marked significant rules and regulations. WIA is a local operation with a tremendous degree of flexibility and an attitude that change and new ways of doing things is desirable. From interviews, both EDD and WIA staff demonstrated only minimal understanding of what the other partner did. WIA staff saw EDD activities as being mandated and something that should not be integrated. EDD staff enjoyed learning about what WIA staff members did, but did not see it providing any release from their other job requirements. The two organizational cultures can be broadly categorized as follows:

Figure VI- 7: CVRural Comparison of WIA and EDD Culture

Cultural Dimension	WIA	EDD	Integration
Impact			
Structure	Flat and Flexible	Bureaucratic and hierarchical	Adjustments as the process unfolds vs. setting well established procedures in advance
Support	Close management contact and high peer support	Management is off OneStop and colleagues are short term	Potential supervisory conflicts
Risk	Innovation is supported and rewarded	Rule oriented	Different views on desired outcomes
Cohesiveness	Strong connections between staff, both socially and at work	Weak, not a team environment	Team outcomes valued vs. individual activities
Outcome Orientation	Long-term benefits are valued	Process and procedure oriented	long vs. short-term outcomes clash

Both WIA and EDD staff felt that their partner could work harder and put in more effort. Concerns were raised over EDD staff not being present when expected and WIA staff not helping with EDD's workload. As one EDD staff member put it, "They want us to integrate so that we can do their work, but we are getting no help in doing ours."

As part of the longer-term goal of improving job prospects, WIA staff placed high value of customer appearance and saw themselves as being models for appropriate work attire. The lobby even has a full length mirror next to the line where customers check in with a sign over it saying, "Would you hire this person?" One story going around is that a woman showed up for local service dressed in what is referred to as "possible sleep attire". With one glance at the mirror she exclaimed, "H... no!" immediately went home and reappeared later that afternoon in appropriate work attire. WIA staff never appears at work, unless it is working to clear out an area or rearrange furniture, in jeans. EDD has casual Fridays. On those days, EDD staff often arrives in jeans and, possibly, t-shirts. EDD is located right next to the reception desk. (See Attachment B on the OneStop layout.) This "casual Friday" attire caused several WIA staff members to express concerns over proper role modeling for their unemployed customers. EDD and WIA staffs get along and share a common worksite. However, the organizational differences made it difficult for integration to penetrate deep within the organizations. The Welcome area was and is well integrated. Both WIA and EDD have similar supervision at this level and have a common view of wanting to make the customers feel comfortable. EDD and WIA staff did socialize for a time. However, this has ceased to be a common occurrence (See the boxed material on "Potluck"). Workshops are given by WIA staff only. None are assigned to EDD staff.

EDD staff sees themselves as only being part of the integration to serve WIA's needs. "WIA needs us to bring in the bodies. Without UI, no one would even show up at their door." We heard comments from both WIA and EDD staff that they would like to integrate again, "as long as it was not with them."

Data Systems

A physical manifestation of the difficulty in integrating the services shows up in the differences in the data collection systems used. WIA started using the VOS system in 2007 and EDD uses the statewide system, CALJOBS. These systems are not compatible and cannot talk with each other. Data collected in VOS is not easily transferrable into CALJOBS and CALJOBS does not easily export into VOS. Both EDD and WIA like the system that they use. EDD likes the use of CALJOBS because it is the state system and provides the online access to customer resumes necessary for UI claims. In addition, CALJOBS has the added benefit of enabling a delay in general posting of job openings so that EDD can meet the mandate of providing veterans early access to job opening prior to making them generally available. While VOS does have this capability, it was not evident to EDD or WIA staff.

WIA staff likes the VOS system. They see it as easier to use and capable of collecting a broader range of information. WIA has found the VOS tracking of services provided especially useful. CALJOBS is seen as archaic and lacking flexibility. The rigidity of the CALJOBS system was seen as reflective of the culture of EDD. For example, if, in inputting a job resume you forgot to capitalize a letter, had saved the page and moved on, you could not go back to correct your error.

An EDD staff supervisor needed to be called forth to unlock the system and permit the correction.

Cost Analysis

The California Workforce Investment Board sponsored the development of a sophisticated Activity Based Costing system for OneStops. This system first identifies all the resources and costs that are “under the OneStop’s roof”. Then traces those costs to the activities that generated those costs and ties those costs to the services produced creating cost/per service measures. These costs are then benchmarked against other OneStops in the system¹³. Here we present the benchmarked costs for this OneStop. Job Seeker and Business services costs are benchmarked separately.

The cost analysis shows that CVRural had over \$1.6 million in costs in the 2008-09 program year the first year of ISD, substantially smaller than the median sized OneStop in the benchmark group. This includes WIA costs, EDD costs and all other partners in the OneStop. Over one-half of these costs were incurred serving job seekers and less than one-half of one percent was attributed to business services. Given that there are few large employers in the county, this distribution is not surprising. While not part of ISD, the CVRural OneStop has a large youth program with a system high cost of \$1.273 million. This is dominated by a summer program and depends upon funding.

Table IV-1: CVRural Costs by Activity with Benchmarks 2008-09

Job Seeker Process

	Your Cost	Median	Low	High	
Job Seeker Total Cost	1,477,044	2,568,050	470,985	7,587,580	
Percentage of OneStop Total Costs:	91.8%				
			Median		
Cost Per Activity	Your Dollar Cost	Your Percent of Total Cost	Percent of Costs	Low Percent of Costs	High Percent of Costs
Outreach and Recruitment	145,204	5.0%	6.5%	0.9%	13.4%
Orientation to OneStop and Initial Assessment	145,204	5.0%	7.1%	1.4%	26.0%
Self Service- Job Search Information and Support	72,602	2.5%	5.7%	1.6%	64.4%
Coaching: for job search information and support	145,204	5.0%	8.6%	0.7%	15.1%
Workshops: Job search and support	72,602	2.5%	6.9%	2.0%	21.6%

¹³ A complete description of this project can be found in the projects report: *California OneStop System cost Study Report* (2007) Sacramento, CA: California Workforce Investment Board, available at www.calwia.org.

Job Seeking Networks	-	0.0%	1.6%	0.6%	8.9%
In-Depth Assessment	72,602	2.5%	3.0%	0.5%	7.4%
Individual Service Plan, such as IEP	145,204	5.0%	5.0%	1.2%	13.7%
Case management	217,807	7.6%	8.6%	2.2%	15.3%
Counseling	72,602	2.5%	3.3%	0.7%	8.0%
ITA/ OJT	145,204	5.0%	4.3%	0.5%	25.0%
Training and Education	97,602	3.4%	3.4%	0.7%	9.8%
Support Services	72,602	2.5%	3.8%	0.5%	10.0%
Placement Assistance	72,602	2.5%	6.3%	0.6%	14.3%
All Job Seeker Activities	1,477,044	51.2%	86.7%	51.2%	100.0%

Business Services Process

	Your Cost	Median	Low	High	
Business Services Total Cost	131,664	257,249	8,836	1,349,880	
Percentage of OneStop Total Costs:	4.6%	7.7%	1.8%	43.7%	
	Your Dollar Cost	Your Percent of Total Cost	Median Percent of Costs	Low Percent of Costs	High Percent of Costs
Cost Per Activity					
Outreach and Marketing	11,661	0.4%	1.4%	0.3%	8.7%
Rapid Response Assistance	32,391	1.1%	1.3%	0.1%	8.7%
Mass Hires/ Job Fairs	25,913	0.9%	1.1%	0.1%	9.0%
Workshops	3,396	0.1%	0.1%	0.0%	1.6%
Business Consulting	6,478	0.2%	0.3%	0.1%	1.5%
Business Center Service	6,478	0.2%	0.4%	0.0%	0.9%
Job Development	45,347	1.6%	2.0%	0.3%	21.8%
All Business Services Activities	131,664	4.6%	7.7%	1.8%	43.7%

Youth Services Process

	Your Cost	Median	Low	High	
Youth Services Total Cost	1,273,765	722,901	455,175	1,273,760	
Percentage of OneStop Total Costs:	44.2%	22.4%	7.1%	44.2%	
Cost Per Activity	Your Dollar Cost	Your Percent of Total Cost	Median Percent of Costs	Low Percent of Costs	High Percent of Costs
Outreach and recruitment	255,753	8.9%	1.4%	0.6%	8.9%
Counseling, Case Management Supportive Services	253,753	8.8%	6.6%	1.5%	10.2%
Summer Youth Planning and Management	190,315	6.6%	3.3%	1.7%	6.6%
College Preparation	66,438	2.3%	1.3%	0.2%	5.8%
Academic Support	63,438	2.2%	2.1%	0.1%	3.7%
Occupational Skill Training	126,877	4.4%	3.6%	0.4%	11.0%
Employment Services	190,315	6.6%	4.4%	0.9%	6.6%
Follow-up	126,877	4.4%	1.1%	0.2%	4.4%
<i>All Youth Services Activities</i>	<i>1,273,765</i>	<i>44.2%</i>	<i>22.4%</i>	<i>7.1%</i>	<i>44.2%</i>

When we look at the activities that generated the costs (see “Cost per Activity section of the table) we see the distribution of costs reflects the ISD goal of enrolling all clients. The highest cost activities were “outreach and recruitment”, “orientation and assessment”, “coaching”, “ITA/OJT”, and “case management”¹⁴. These costs were below the median for benchmark group which includes a number of non-ISD OneStops.

¹⁴ An important note on costs, since this system measures costs that occur under the OneStop roof, training which takes place off OneStop, such as a client enrolled in a community college training program is excluded. So the cost of assessing and case managing a client with an ITA would be included the actual cost of the ITA is excluded.

Table IV-2: CVRural Costs per Unit of Job Seeker Service with Benchmarks 2008-09

Cost Per Unit of Service	Your Dollar Cost Per Unit	Median Cost Per Unit of Service	Low Cost Per Unit of Service	High Cost Per Unit of Service
Cost per individual Job Seekers served (Enrolled Client + Universal Clients. Unique individuals)	\$16	\$22	\$1.79	\$119
Cost Per new Job Seeker	\$31	\$64	\$7.15	\$292
Cost Per Job Seeker Visit	\$4.99	\$10.46	\$0.60	\$67
Cost Per Job Seeker Service Event (e.g. faxed a resume, accessed career information on internet)	\$2.51	\$10.61	\$0.92	\$40
Cost per one-on-one coaching events	\$21	\$72	\$2.23	\$486
Cost Per Workshop	\$141	\$1,016	\$113	\$4,533
Cost Per Person attending	\$180	\$85	\$19	\$572
Cost per Job club or network member	\$0.00	\$709	\$65	\$5,222
Cost per person attending	\$0.00	\$579	\$44	\$1,431
Cost Per Job Seeker completing comprehensive assessments	\$91	\$189	\$14	\$1,124
Cost Per IEPs or other formal plans created	\$675	\$177	\$10.50	\$675
Cost per client getting case management	\$138	\$144	\$26	\$1,377
Cost per meeting with case manager	\$116	\$61	\$8.92	\$245,846
Cost per client session	\$97	\$1,080	\$14	\$13,110
Cost per client with ITA or OJT	\$936	\$850	\$134	\$2,288
Cost per client receiving training/education	\$564	\$373	\$18	\$1,770
Cost per hour of training/ education	\$0.00	\$79	\$21	\$8,337
Cost per client receiving support services	\$427	\$397	\$16	\$2,052
Cost per client placed (entered employment)	\$571	\$807	\$92	\$8,401

Overall costs per unit at CVRural are low, relative to the median costs at other OneStops. CVRural does have a relatively low cost per client. This is an overall measure of costs and implies a relatively efficient operation. What does stand out in this cost data is that the cost per workshop is significantly below the median cost and close to the low cost per unit. However, the cost per person attending is relatively high. They appear to have many, lightly attended workshops. CVRural does have a significant level of costs in case management. The cost per IEPs or other formal plans created is the highest in the system meeting costs with a case manager are relatively high. The number of formal plans is relatively low (215 created with the system median at 1276 and the low number being 166).

Partner Contributions

WIA at CVRural is that largest participant in the OneStop. The various partner contributions are detailed in Table IV-3. WIA contributes 69 percent on the overall costs. EDD is substantially smaller, contributing 18 percent of the total costs. This dramatic difference in size contributed to the difficulty in integrating the services between these two organizations.

Table IV-3: Partner Contribution Report for CVRural 2008-09

Total Costs

	Your Dollar Amount	Median	Low	High	Your Percentage	Median	Low	High
Total One Stop Cost	\$4,124,355	\$2,626,190	\$147,000	\$9,758,580	--	--	--	--
WIA Local Area Costs	\$2,850,373	\$1,368,900	\$380,438	\$8,534,000	69%	98%	26%	100%
Partner Costs:								
Aging and Adult	\$35,600	\$32,229	\$24,459	\$40,000	1%	1%	1%	1%
Dept of Rehab	\$5,298	\$16,220	\$1,402	\$1,450,760	0%	1%	0%	39%
EDD	\$755,729	\$1,253,480	\$17,023	\$3,418,940	18%	21%	1%	74%
Local Adult School	\$72,343	\$112,605	\$1,801	\$476,233	2%	3%	0%	17%
Local College or University	\$32,100	\$33,550	\$450	\$2,177,200	1%	1%	0%	26%
SBDC		\$71,950	\$4,900	\$139,000		47%	0%	95%
Other Local Partner	\$372,912	\$29,984	\$2,600	\$2,614,140	9%	4%	0%	38%

Job Seeker Costs

	Your Dollar Amount	Median	Low	High	Your Percentage	Median	Low	High
Total Job Seeker Cost	\$2,487,742	\$1,711,460	\$69,500	\$7,587,580	--	--	--	--
WIA Local Area Costs	\$1,452,044	\$1,205,750	\$371,602	\$6,363,000	58%	98%	24%	100%
Partner Costs:								
Aging and Adult	\$35,600	\$32,229	\$24,459	\$40,000	1%	2%	1%	2%
Dept of Rehab	\$5,298	\$16,220	\$1,402	\$1,450,760	0%	1%	0%	42%
EDD	\$544,125	\$1,171,470	\$17,023	\$3,213,810	22%	19%	1%	73%
Local Adult School	\$72,343	\$110,130	\$1,801	\$476,233	3%	3%	0%	20%
Local College or University	\$25,000	\$25,000	\$450	\$2,177,200	1%	2%	0%	33%
Other Local School								
SBDC		\$69,500	\$69,500	\$69,500		100%	100%	100%
Other Local Partner	\$353,332	\$29,984	\$2,600	\$1,934,630	14%	4%	0%	37%

Business Services Costs

	Your Dollar Amount	Median	Low	High	Your Percentage	Median	Low	High
Total Business Services Cost	\$362,848	\$257,249	\$8,836	\$1,774,520	--	--	--	--
WIA Local Area Costs	\$129,564	\$214,880	\$8,836	\$1,277,400	36%	100%	8%	100%
Partner Costs:								
Dept of Rehab		\$8,000	\$8,000	\$8,000		10%	10%	10%
EDD	\$211,604	\$205,137	\$1,483	\$1,076,090	58%	69%	2%	100%
Local Adult School		\$1,500	\$1,500	\$1,500		1%	1%	1%
Local College or University	\$2,100	\$2,100	\$2,100	\$2,100	1%	2%	2%	2%
Other Local School								
SBDC		\$37,200	\$4,900	\$69,500		45%	0%	90%
Veterans Administration								

Other Local Partner	\$19,580	\$266,241	\$160,349	\$679,506	5%	20%	14%	38%
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Youth Services Costs

	Your Dollar Amount	Median	Low	High	Your Percentage	Median	Low	High
Total Youth Services Cost	\$1,273,765	\$722,901	\$455,175	\$1,463,720	--	--	--	--
WIA Local Area Costs	\$1,268,765	\$687,764	\$420,175	\$1,463,720	100%	100%	76%	100%
Partner Costs:								
Local College or University	\$5,000	\$20,000	\$5,000	\$35,000	0%	4%	0%	8%
Other Local Partner		\$140,363	\$140,363	\$140,363		24%	24%	24%

It is interesting to note that EDD was a large contributor in the area of business services. EDD contributes 58 percent of the business service costs with WIA covering only 36 percent. This difference is likely the result of historical activities and a difference in goals of the two organizations. The business service areas at CVRural seem more evenly distributed and there was little discussion of any integration difficulties in this area.

Lessons Learned

The Welcome Team model used at CVRural demonstrates many of the factors that lead to effective integration. The WIA welcome team supervisor AND the local EDD supervisor are both physically located in the same area of the CVRural OneStop. As such, they encounter each other on a daily basis and can easily meet to discuss any problems or changes that occur without necessarily arranging a meeting, creating an agenda, and bringing all participants together to discuss the situation. Also, the Welcome Team is coordinated by supervisors who are generally at the same administrative level. This set of circumstances plays out in that the Welcome Team was and remains integrated even after the Learning Lab period.

But to realize the ISD vision, coordination and integration needs to occur at all levels. Integrating at the staff level can provide some benefits, such as those seen in the Welcome team activities. However, broader level gains are facilitated by integration at both supervisory and managerial levels. This integration was minimal at the CVRural OneStop.

In order to work together and effectively integrate product delivery, the integrating partners need some common vision of the outcomes they want to create. With the different

groups seeing different goals, working through a common process is very difficult. The goals, for either partner, were not easily articulated by the staff. WIA staff saw a gain in having more labor. EDD staffs integrated through a decision made at a higher administrative level, and were less enthusiastic.

Benefits for all partners in the integration process are essential to maintain buy-in to the integration process. Throughout all of the interviews and discussions, we found no identification of the savings necessary to facilitate integrated delivery, yet the increase in service volume and relatively low cost per client overall indicate that some substantial economies were achieved. In addition, having a choice on moving to integration is desirable. EDD staff was told to integrate. They were not shown potential benefits or gains. Instead, it became part of the rules and regulations they were required to follow. Without choice, EDD staff viewed this integration as an additional requirement to help deliver WIA's product. They saw no reduction in their other duties and a one directional benefit.

Physical problems can exacerbate integration problems. While the differences in data systems are not sufficient to derail the integration process, those differences can easily cause staff to focus on the problems of integration and place a negative connotation on the process. Providing the software that serves both the desires of WIA and the mandated requirements of EDD would remove one obstacle to integrated service delivery.

The work towards integration comes at the managerial, local supervisory and local staff level. Getting the local staff to work effectively on integration appears to work effectively. This is evidenced by the success of the Welcome team. One difficulty in integration is that the managerial level for EDD is centralized in a different county and at broader, regional levels. Management for WIA services is very local. EDD management is large, at the state level. However, management is large at the local level for WIA services. A closer integration at the managerial level would greatly facilitate integrated service delivery.

**V: The Transport City OneStop:
Long Term Collaboration**

The Transport City OneStop: Long Term Collaboration

The main area of the Transport City OneStop looks like a large open space designed for retail. The first thing that strikes a visitor is the carefully coordinated color scheme of greens and grays, that is carried through from the rug, to the posters on the wall featuring local growth industries, to the comfortable modern furniture. The receptionists sit on stools behind high computer stations that keep them eye to eye with visitors. There is no counter or desk. A large waiting area has comfortable stuffed chairs and a large flat screen with changing information. The atmosphere feels much more like a corporate waiting room than a government social service program. The greeting and waiting area is quiet and professional.

A large sign on the lobby wall signals this OneStop's commitment to ISD:

Every customer leaves this center a better job candidate. We believe all customers deserve an opportunity to:

- *Know their skills*
- *Develop and improve their skills*
- *Get the best job possible with their skills.*

Casually dressed staff all with identical grey and green badges featuring the OneStop name and logo move briskly through the area. It is impossible to tell EDD and WIA employees apart.

The WIA Local Area

Overview

The Transport local WIA area encompasses four cities in a large urban county. Our case site, the Transport City OneStop is by far the largest of four OneStops in this local area, it serves over 95% of the local area's WIA customers. The city it serves has a workforce of 339,000. The local economy is dominated by four high-growth industries transportation, oil, healthcare, and green jobs. A local port and related transportation infrastructure makes transportation and warehousing one of the larger industries in the area. The area also has a large oil industry; both underground and offshore. Manufacturers include aircraft, automobile parts, electronic and audiovisual equipment, and home furnishings. It is also home to the headquarters for several large corporations such as Epson America, Molina Healthcare, and SCAN Health Plan. The region has grown with the development of high-technology and aerospace industries. Connecting these industries to a skilled workforce is one of the Transport City WIB's key strategies. The WIB wants to focus its activities on new high-demand industries while continuing to build on existing industry initiatives. This local area has suffered from the recession like the rest of the state, but is harder hit than most areas. The unemployment rate for the local area in May 2010 is 11.9% compared to a statewide figure of 9.3%

The WIA local area has a large education segment including, several community colleges, a CSU campus, and several private colleges and universities. The center works directly

with the local CSU, which has an office and staff on site. The center also has devoted staff for veterans, and disability programs.

The local area is operated by the Transport City Government the largest of the four cities. Staff of the WIA local area and the Transport City OneStop are City employees.

The Decision to Be an ISD Site

Ben, the Local Area's Executive Director, is enthusiastic about the ISD concept. In his view "it feels like what was anticipated and expected from WIA. People thought we were already doing it." He notes the decision to become an ISD site was not difficult because the local WIA and EDD program already had a close cooperative relationship. EDD had been co-located at the Transport OneStop for 15 years. In fact he notes: "In the past we crossed lines to cooperate when the system said we shouldn't." Cleve, another senior manager, noted that there had been extensive cooperation between EDD and WIA when the area had experienced a major military base closure several years before, providing a positive experience with extended collaboration and that built trust between the agencies.

A sign of this close relationship is that the EDD site manager Marcia and Ben wanted to be interviewed together. They have been together at this site and in the local area for four years. Marcia is also a supporter of the ISD strategy; as she sees it: "We both have the same goal, to serve the clients. We can't do it alone." In her view ISD was a good strategy for dealing with the "dwindling resources" that both agencies confronted prior to stimulus funding. She also points to the long history of cooperation between the two agencies, but notes that since the implementation of ISD "we married each other more!" She says the two agencies have learned from each other and that in the end "its not increasing numbers that matters, but finding people jobs."

Ben and Marcia made the decision to become a Learning Lab and participate in the ISD initiative together. They decided to make all four OneStops in the Transport Local Area Learning Labs, using the ISD model. Marcia says she had good support from her EDD superiors. Both had attended early meetings in Sacramento where the concept was explained. They both recall the moment when, in a public meeting with other WIA and EDD managers, they made a public commitment to become an ISD site. Interestingly, Ben did not ask his local WIB to vote on becoming an ISD site. Rather he viewed the decision as an operational decision and made it an information item for the WIB. He notes the WIB was kept informed throughout the process, but the transition was not a policy issue on which the WIB needed to vote. Cleve, reported that managers in the local area thought that by participating in ISD they could help shape the initiative. This local area aggressively seeks discretionary funding, local managers believed that participating in the ISD initiative would better position them to win funding because "our numbers will look better" and they believed they would benefit from cooperating with the state on this important initiative.

The Transition to ISD

The transition began with a meeting of ten senior managers representing both EDD and the WIA, to explain the ISD concept and its benefits. To kickoff the transition for the larger staff, they had Dennis Petrie from EDD and Greg Newton, the consultant who introduced the concept at the state level, conduct a day-long, on-site training. A second training consultant led team building sessions to help merge EDD and WIA staff. Several staff in interviews mentioned the team building sessions as positive experience that brought them closer together.

The response of the staff to ISD was generally positive. A few barriers were mentioned by various managers and staff. The first was that some WIA staff had negative perceptions about the skill level of EDD staff and wondered if they could deliver services at the expected level. EDD managers mentioned that EDD staff did not want to give up using CalJobs system as they saw their expertise with that system as valuable.¹⁵ There were also some views that the WIA culture was more entrepreneurial; in that this local area had always been aggressive in seeking discretionary funding and that the EDD culture was bureaucratic. But both EDD and WIA staff saw most staff of the other agency as supportive and welcoming and there is a general view that the transition overcame these barriers. One manager noted that integration was now so deeply ingrained “I have to look at the phone list to remember who is an EDD and who is a WIA employee!”

The positive relationship between the EDD manager Marcia and the WIA Executive Director Ben was mentioned by several staff as a significant factor in making the transition to ISD a success, as one staff member put it: “since the top leaders get along, that cooperation just rolls down. Marcia and Ben are open to trying new things and that has made this WIB entrepreneurial.”

Most staff see benefits from adopting the ISD strategy. One manager summed up a commonly held view this way: “ISD maximizes your capacity to deliver services. I don’t want to do the minimum. If you want to do what you got into WIA to do, you have to leverage resources and that is what ISD does.”

ISD Design

The initial design followed the “Greg Newton Model” employees were assigned to one of three teams: Welcome, Skill Building, and Business. Over time, Transport OneStop found this design to be too rigid. They now view these areas as functions and the staff as one big team that moves among the functions. There has been a big investment in cross training, so for example, staff who work at the welcome desk can also be skill specialists, or do placement.

An interesting aspect of the ISD design at this site is that managers consciously worked to reconfigure the space and chose furnishing and put up graphics that reflected the ISD strategy.

¹⁵ As part of the transition to ISD the OneStop moved to using the Virtual OneStop System exclusively. This is a comprehensive software platform that keeps schedules, client records, includes a website, and generates reports. The system uploads data to both JTA and CalJobs. To stay on this one platform, Transport City bought the Veteran component of the system to meet EDD needs.

Thus as noted before there is no counter at reception and people must check-in in the entry way, which is very open. WIA and EDD staff cubicles are mixed and there is no door way between the cubicle area and the resource room. Large graphics reinforce the ISD mission and the ten industries the local area is targeting. There are open cubicles off the resource rooms where staff can sit and talk with clients and have some privacy.

Another aspect of the initial design that changed had to do with data entry. Historically the local area had had a data entry unit. With ISD they had hoped that clients and staff between them would do all the data entry. But after ISD launched they found the data entry burden to be overwhelming and they recreated a data entry unit with five employees to keep up with data entry.

Finally in keeping with ISD model this site originally tried to enroll everyone. Ben notes “We did all means all. That is my one regret. We believed in it and we were stupid.” With the recession that occurred right as ISD was implemented the system was quickly over whelmed. Now clients who don’t want to go through the registration process can get a “one day pass” to use the resource room and in fact can use the facility for multiple days. Currently managers estimate that about 75% of clients are enrolled in JTA.

ISD Service and Volume

Figure V-1 below shows the total number of clients served by the Transport City Local Area. As the data show, the number of clients served actually declined with the implementation of ISD by 1,555 clients. Figure V-2 shows the stark contrast with a dramatic increase in the number of clients formally enrolled in WIA. WIA enrollments increased from about 1,500 to over 11,500, and increase of over 700%. This raises the paradoxical result that when the local area attempted to enroll everyone in WIA they actually served fewer clients although they did vastly increase the number formally enrolled in WIA. Interestingly, in the partial year 2009-10, the area actually reports more new clients than in all of 2008-09, even through total clients served had declined in 2008-09. This may be because allowing clients back into the center without enrolling actually increases the number served, or it may simply be the demand for services created by the recession.

Figure V-1: All Clients Served in Transport City Local Area 2007-08 to First two quarters of 2009-10

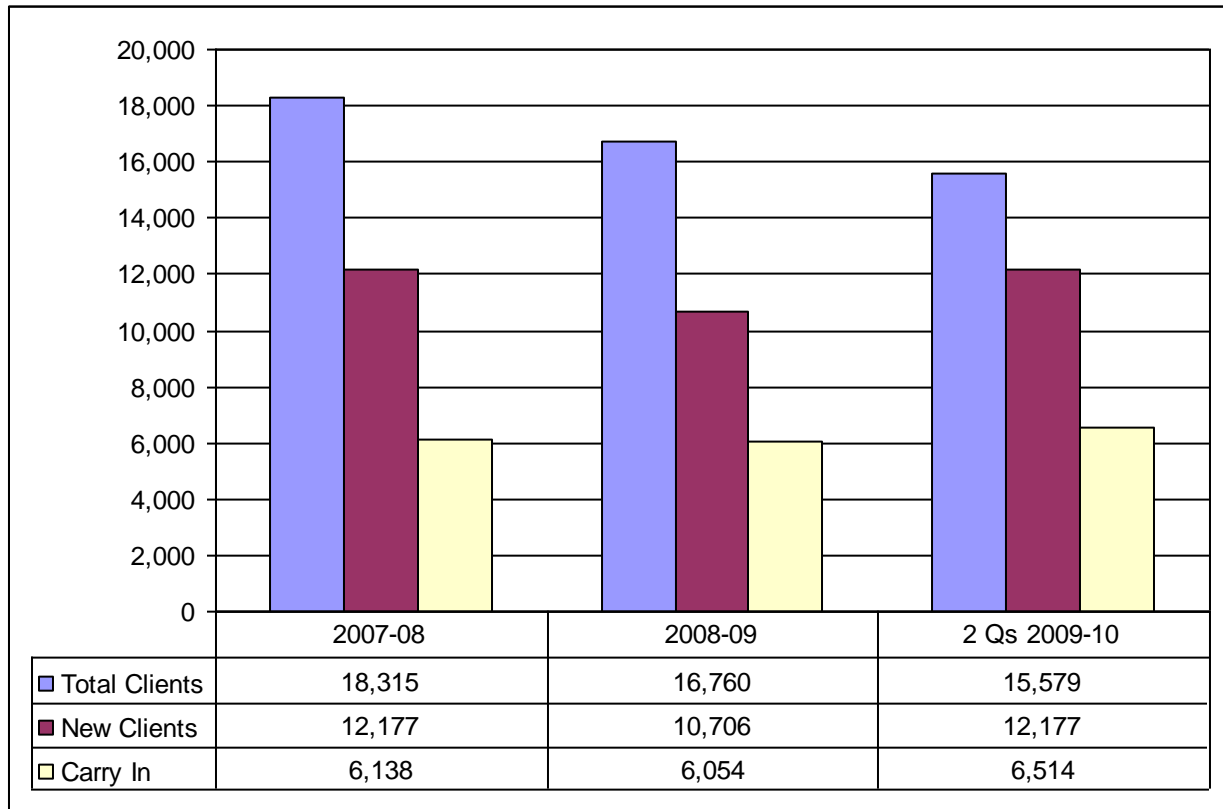
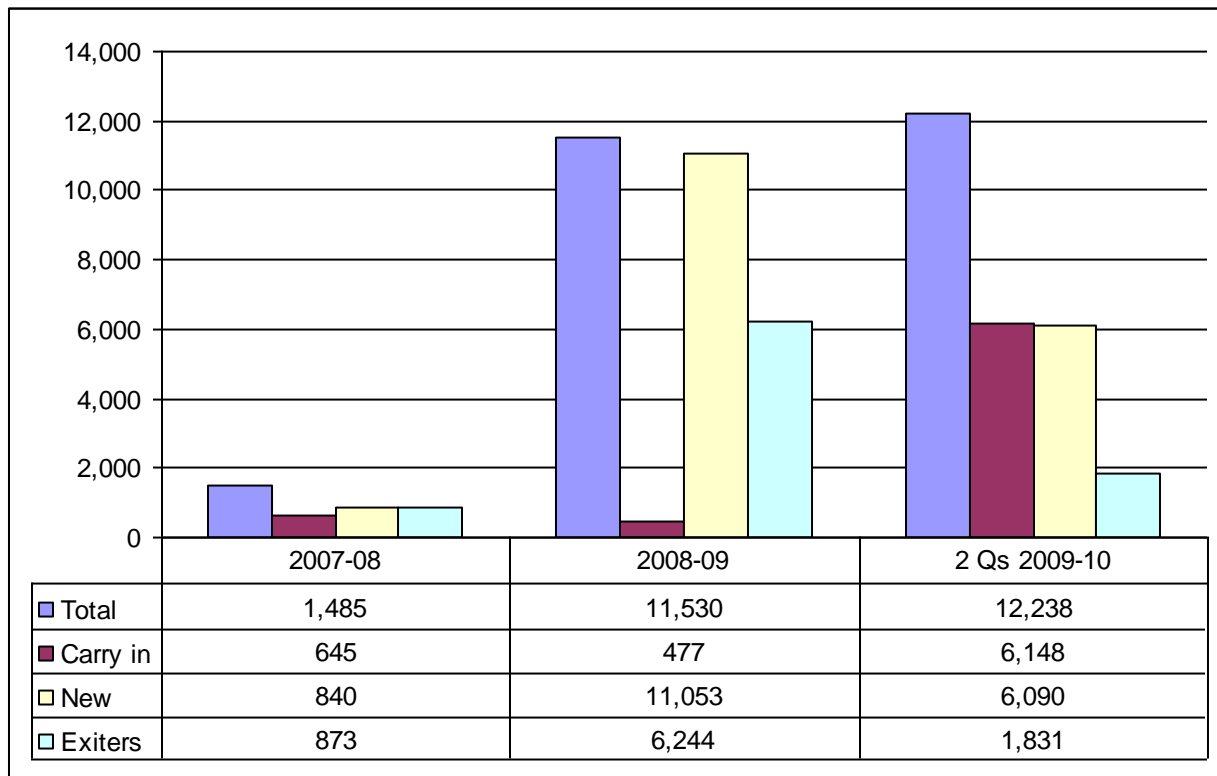
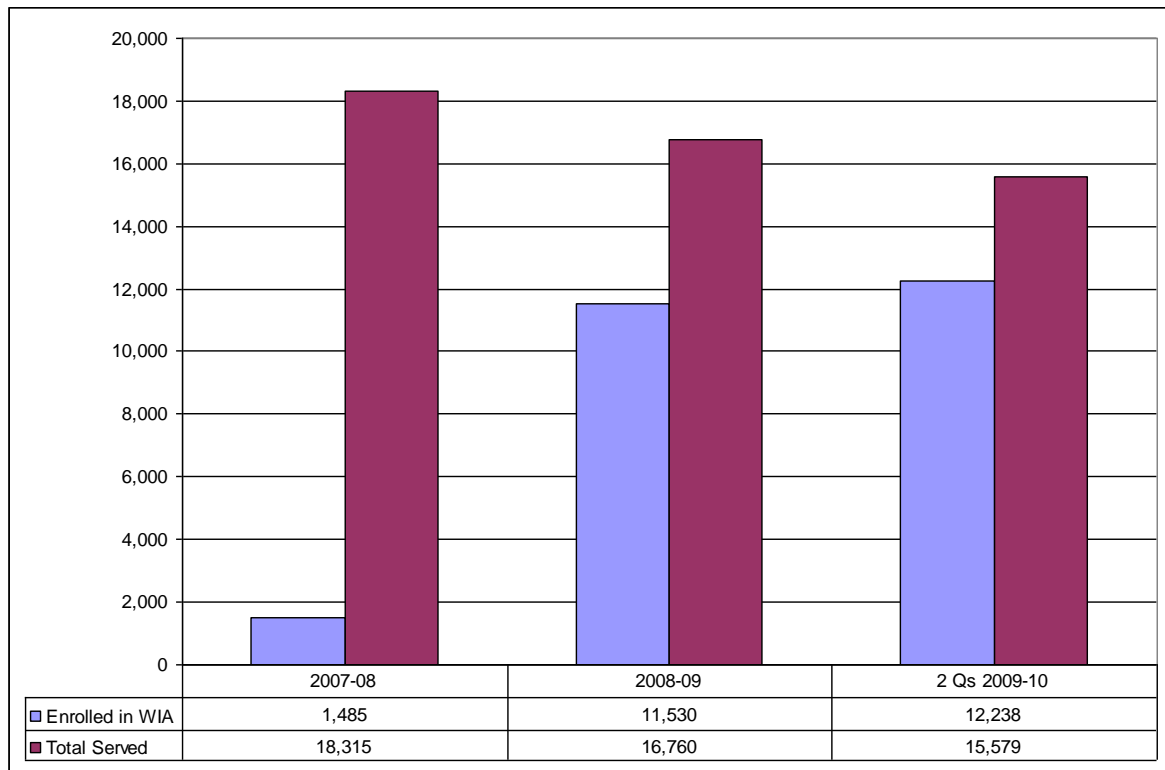


Figure V-2: Number of Clients Enrolled in WIA In Transport City Local Area 2007-08 to First two quarters of 2009-10



To simplify these trends in Figure V-3 we just compare the total number served to the number enrolled in WIA. Here we see the clear pattern of rapidly increasing WIA enrollments and a decline in total number of clients served.

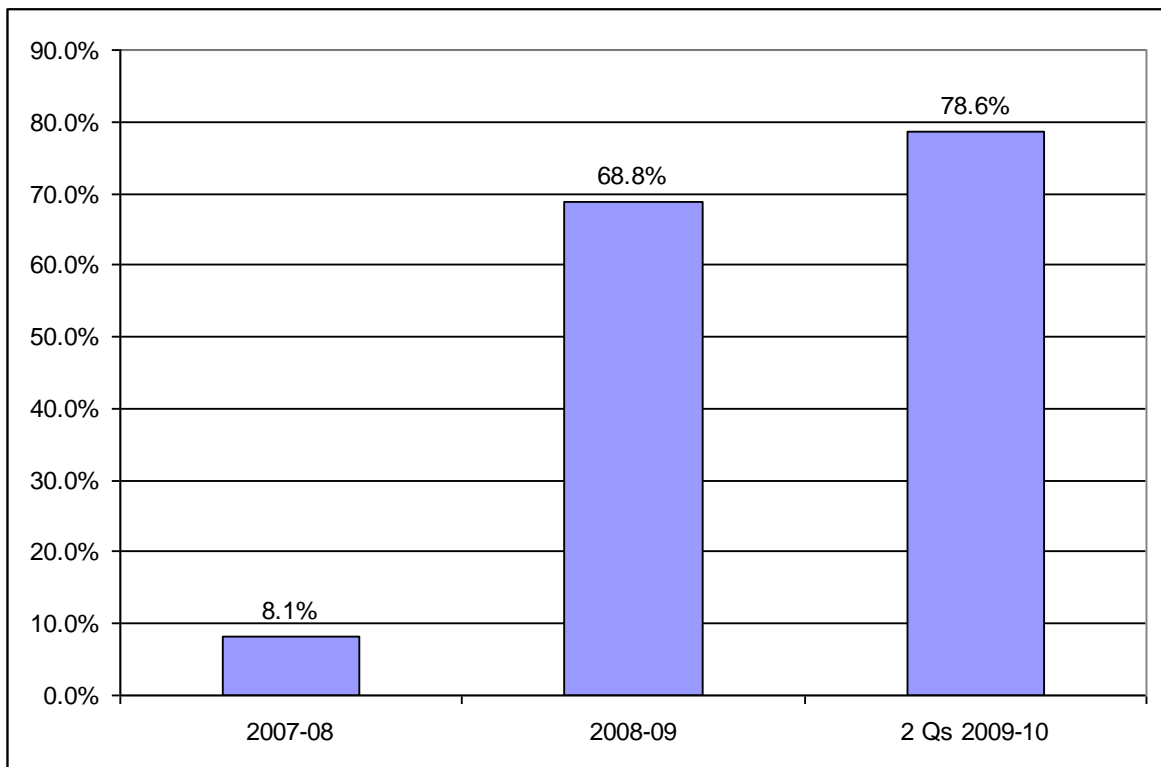
Figure V-3: Transport City Local Area Total WIA Enrolled Clients and All Clients Area 2007-08 to First two quarters of 2009-10



Discussing the decline in the total number of clients served, Ben commented that the “the decline is beautiful, because it shows that we getting down to just serving serious job seekers.” In Ben’s view the larger numbers generated largely by the Universal Service function of the old WIA model included many people who were not serious about finding the job and were just hanging around the resource room, or who were there because they were required to come to the center by another program. He further noted that EDD employees were more interested in continuing to serve clients who just casually drop in, while on the WIA side they wanted to focus on committed job seekers. Ben thinks these differing attitudes are driven by EDD’s “widget counting”. He believes his EDD counterparts are evaluated principally by how many resumes and job listing get entered into CalJobs so they are willing to drive volume anyway possible.

Finally, we calculated the percent of all clients who were enrolled in WIA in Figure V-4. Interestingly, while senior managers said the percent of clients enrolled had declined since the start of ISD these data show the percent increasing, even in the current year. It is important to note that both ISD years “all” clients were not enrolled. We also note again the 2009-10 is just the first two quarters of the year.

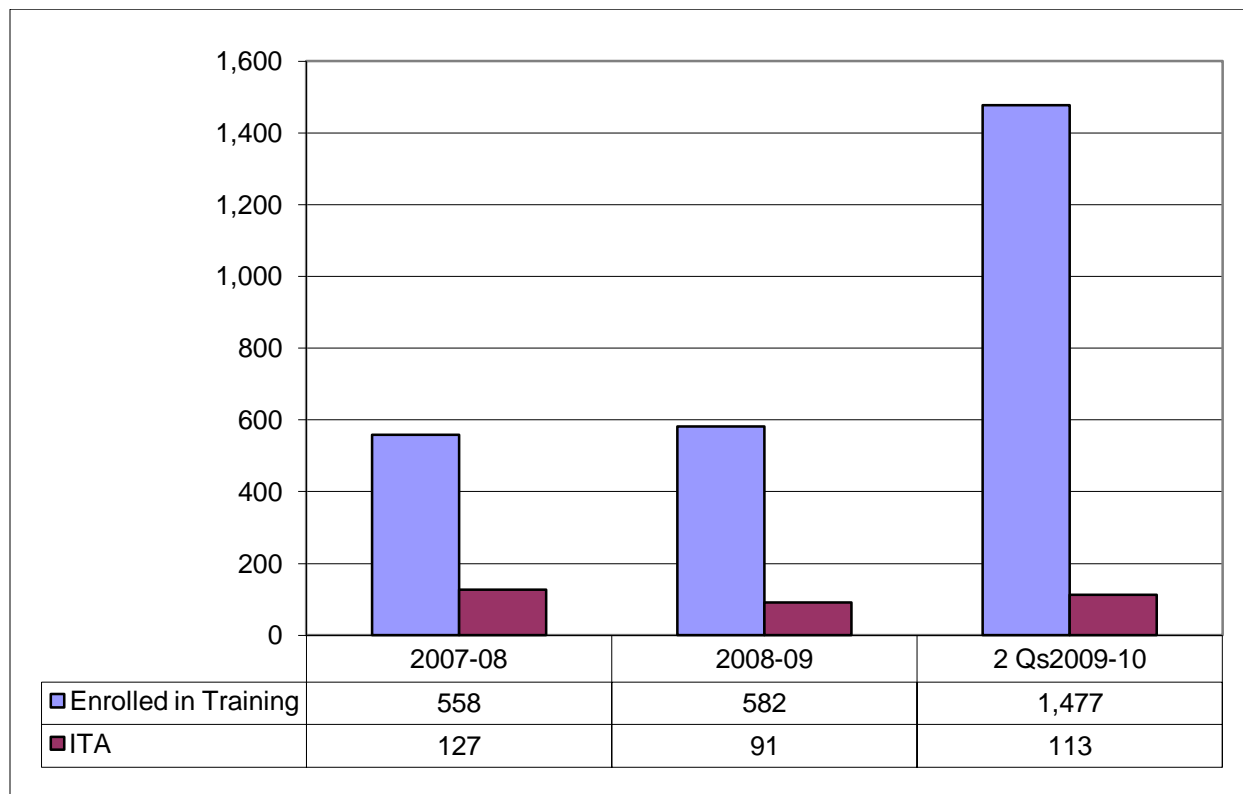
Figure V-4: Percent of all Transport City Local Area Clients Enrolled in WIA 2007-08 to First two quarters of 2009-10



ISD and Training

A major focus of the ISD implementation at Transport City OneStop was skills development. The local area wanted to focus intensely on improving clients’ skills rather than trying to immediately place people in jobs. Ben noted that in the original ISD design they wanted every client to get some skills development, even if it was just a three week on-line course in MicroSoft office. The figure below shows that the number of clients receiving training stayed roughly the same in the initial year of ISD, 2008-09, but the most recent year the number of clients receiving training increased 150%, in just the first two quarters of the year. Part of this increase is probably due to the influx of ARRA money and part to the change in strategy. Interestingly the number of ITAs actually decline slightly indicating the focus of training was on other forms of training.

Figure V-5: Transport City Local Areas Number Clients Receiving Training in WIA 2007-08 to Full Year 2009-10



ISD and Performance

While Ben is enthusiastic about the ISD model, he does worry that increasing WIA enrollments dramatically over the last three years plus the impact of the recession has hurt his local area's performance on the federal performance measures. He acknowledges that there has been a promise from state leaders that his Transport City will not be punished for changes in performance, that are associated with implementing ISD; he still believes in the long run performance will count.

Here we show the Transport City local area's performance data in the 2007-08 the year before ISD, 2008-09 the first year of ISD and the first two quarters of 2009-10.

As Figure V-6 indicates the entered employment rate fell steeply from 79% in the year before ISD to 48% in the first full year of ISD and then drops again to 33% for the first two quarters of 2009-10. All of this decline cannot be attributed to ISD as the economy fell into recession at the same time and as we noted in the introduction Transport City serves an area of particularly high unemployment. It is also important to note the substantial lag time in the calculation of federal measures. Because the measures focus on what happens to clients in the labor market after they leave the program and reporting lags in the unemployment insurance system which provides the data, data are for clients who exited the program as much as nine

months earlier, so the data from 2008-09 is largely for clients who were not served under the ISD model but the old model; data for the first two quarters of 2009-10 are for clients served by the ISD Model. It is unclear if the decline in the employment rate is due to changes caused by ISD or simply problems in the local labor market, but in any case we see a dramatic decline in employment for exiters who were enrolled in WIA.

Figure V-6: Transport City Local Area Entered Employment Rate

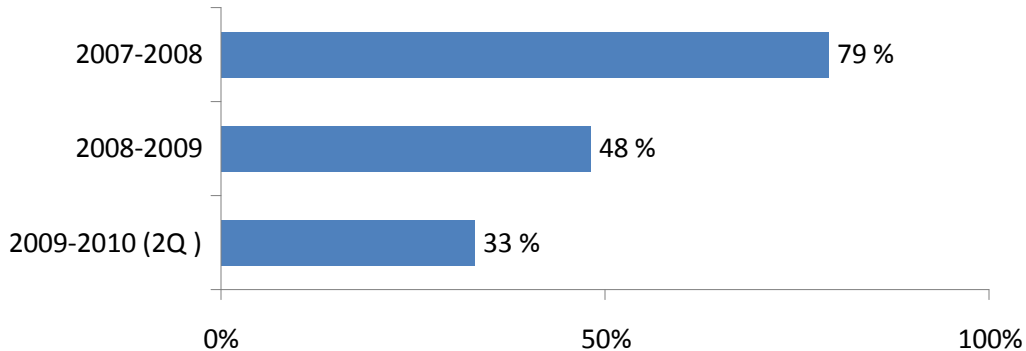


Figure V-7, shows the retained in employment measure (how many clients who left the program were still employed six months later) declined just slightly from 87% to 84% in the first year of ISD. Again this represents a pool of clients served in the year before ISD. In the following year the larger pool of clients served by ISD, show a marked decline from 84% to 70%, again much of this decline could be attributed to the recession.

Figure V-7: Transport City Local Area Retention Rate

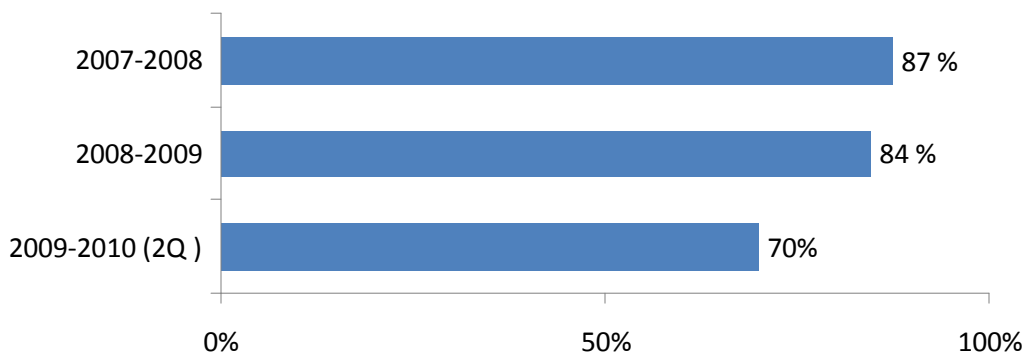
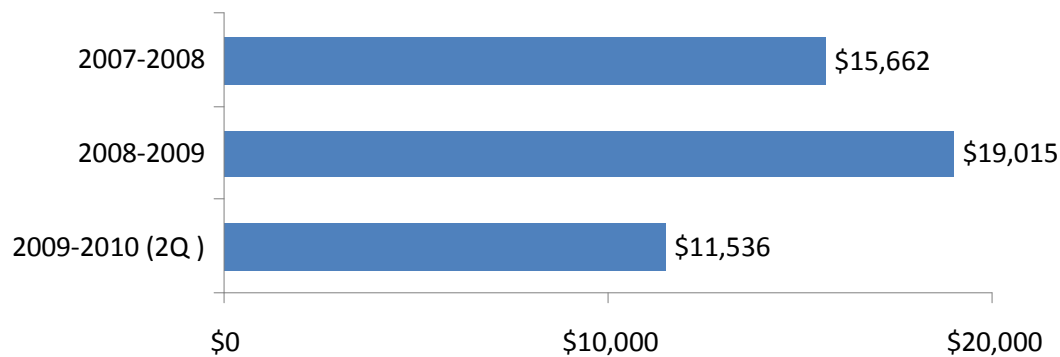


Figure V-8 shows the earning measure which reports the earning of clients the first two full quarters after leaving the program show a different pattern. In 2008-09 the first year of ISD earning rise substantially by over \$3,400, but this is largely clients served during the pre-ISD period. In the first two quarters of 2009-10, measuring the population of clients served under the ISD system show a marked decline of over \$7,400. Again it is likely that it is the recession and not ISD that accounts for much of this decline.

Figure V-8: Transport City Local Area Average Earning Performance Measure



Case Study Site

Our case study site, Transport OneStop, is a large comprehensive OneStop serving the largest of the four cities in the local area. It is the largest OneStop in the local area by far serving over 95% of the local area's customers. This large city has an unemployment rate of 13.3% substantially above the state rate of 9.3%, in May 2010. The area is a densely developed, with mix of new development including tech centers and retail, and older manufacturing, oil refining, transportation and warehouse development. The center is located in a six story office building, which also holds offices for the WIA Local Area. The building is on a busy street a couple blocks from a major freeway. There is a parking lot and a small two story parking structure on the site.

The main area of the OneStop is on the first floor of the building in what looks like a large open space designed for retail. The first thing that strikes a visitor is the carefully coordinated color scheme of greens and grays, that is carried through from the rug to the posters on the wall, to the comfortable modern furniture. The receptionists sit on stools behind high computer stations that keep them eye to eye with visitors. There is no counter or desk. A large waiting area has comfortable stuffed chairs and a large flat screen with changing information. The atmosphere feels much more like a corporate waiting room than a government social service program. The greeting and waiting area is quiet and professional.

A large sign on the lobby wall has mission and vision for the center and reads:

Every customer leaves this center a better job candidate. We believe all customers deserve an opportunity to:

- *Know their skills*
- *Develop and improve their skills*
- *Get the best job possible with their skills.*

This is followed by a list of rules, the Transport City and EDD logo are displayed side by side.

Most of the 20 or more chairs in the waiting room are full, and every couple minutes a staff person appears, calls a name and escorts a client back into the center.

To the right of the waiting area and directly behind the receptionist is the computer services area. Several hundred square feet are devoted to this area filled with computers, fax machines and telephones. One of the corners with about 10-15 computers, is reserved for training. Throughout this area, the walls feature posters describing the 10 different industries clusters the local area targets such as telecommunications, construction, and green jobs. Under each poster are several pamphlets going into more detail about types of jobs in the industry and median wages offered. There are also other posters and pamphlets regarding events such as job fairs and workshops. Every aspect of the room is glossy, professional and orderly.

Off the resource room, but open and easily accessible, are staff cubicles and along the wall managers' offices. The managers' offices have glass walls and open doors. Clients move easily between the public spaces and the cubicles and offices.

The second floor holds meeting rooms, smaller departments of the OneStop, and specialized client services.

The third floor contains all the administration officers' offices for the WIA Local Areas and EDD managers. Support operations are run from here. The walls are lined with offices (8-10) for directors. 40-50 cubicles take up the rest of the room. There are also meetings rooms and a board room available. All data integration and budget procurement are done on this floor.

OneStop Structure

The center is staffed by 29 EDD employees and 41 employees of the WIA Local Area. Staff are all casually but neatly dressed. They all wear green and gray badges with their name and the logo of the Transport City Local Area. It is impossible for a visitor to distinguish EDD from WIA employees.

Both the local EDD manager and the Executive Director of the Local Area are in the building but up on the third floor. OneStop managers from both WIA and EDD have offices on the first floor which is part of the public area of the OneStop. We notice there is always a manager or supervisor moving around the resource room assisting clients and answering questions from the staff. The overall impression is that of a busy, but quiet, well run library.

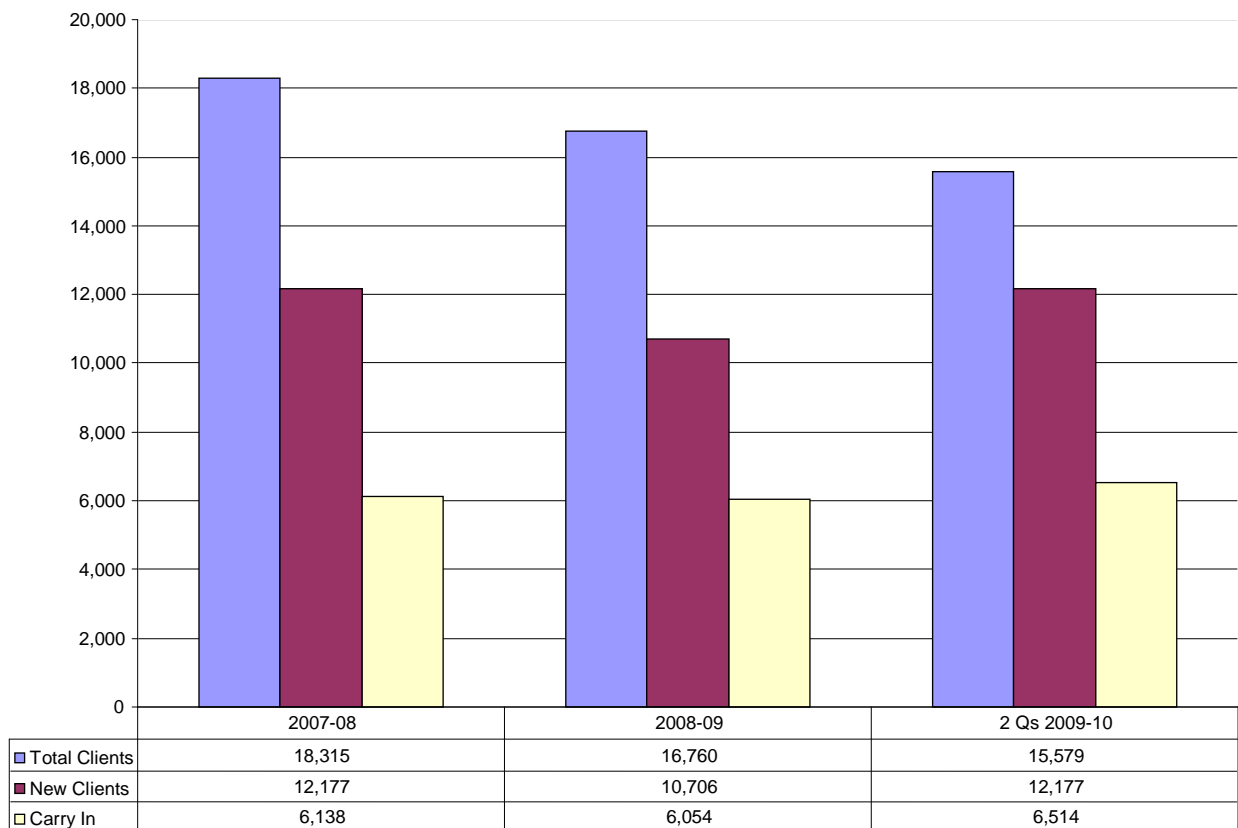
Volume of Clients and Services

Unfortunately separate JTA data were not available for the OneStop alone but we expect that the pattern of WIA enrollments would follow the pattern of the Transport City Local area, since this OneStop accounts for 95% of the local area's enrollments.

Data from the Virtual OneStop (VOS) System which Transport City uses to track enrolled and non-enrolled clients was available for the OneStop alone. The data show that the OneStop is a busy place. It served 16,760 clients in 2008-09. In the first two quarters of 2009-

10 alone it had 12,177 new clients. We found that the trend in clients served in the local area applies to the Transport City OneStop as well. Total clients served actually falls in the first year of ISD from 18,315 to 16,760. Again, data from the current year suggests that the number of clients served is increasing as the number of new clients in the first two quarters of 2009-10 actually exceeds the total number of new clients in 2008-09.

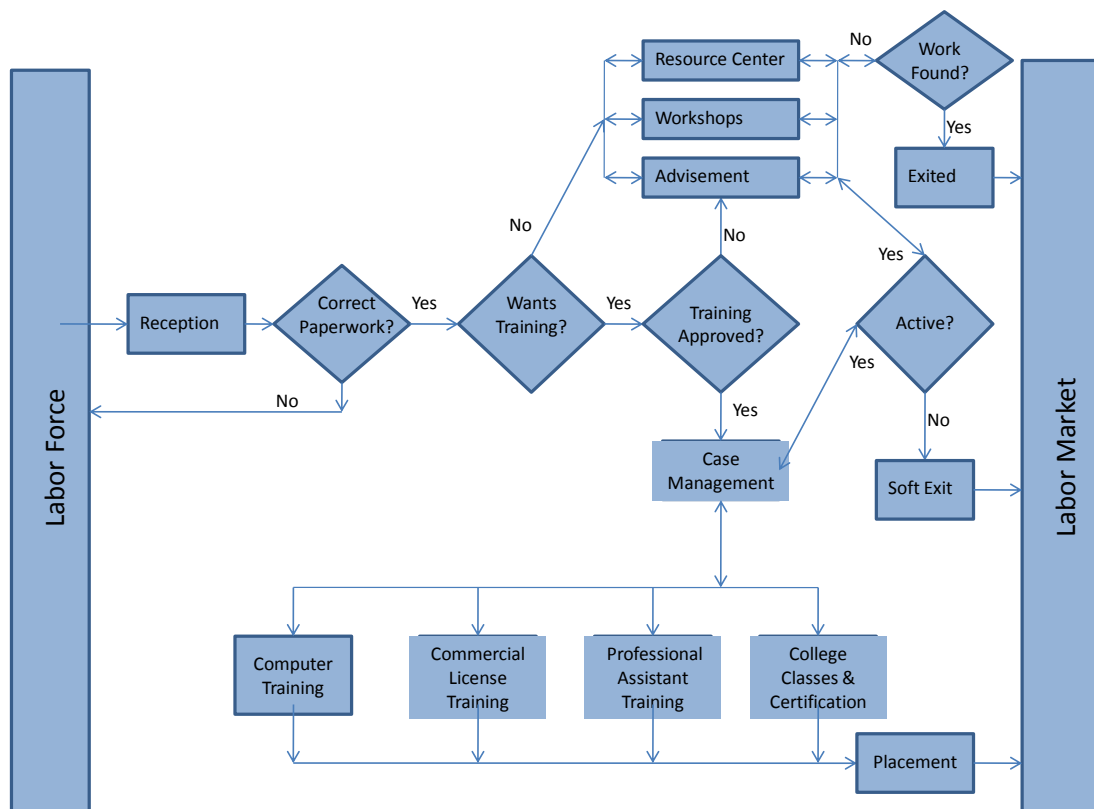
Figure V-9: Total Clients Served Transport City OneStop 2002-08 to First Two Quarters of 2009-10



The ISD Process

A major purpose of ISD was to reengineer the process that serves both EDD and WIA clients. Here we describe the process in the Transport City OneStop as we observed it during our visits. A graphic of the process is in Figure V-10

Figure V-10 Transport City OneStop Process Map



Step

1: Reception

Everyone coming into the OneStop, whether they are a new client or a regular visitor, must check in with the receptionist. The receptionist greets the client, asks if the client is a member, if they say they are they will check in the data system to make sure their membership is current and then find out why they came to the OneStop today. If they need to see a staff member they will put them in the electronic queue, which is part of the VOS system which makes a waiting list that can be seen by the receptionist and the staff in their cubicle. Staff who are “up” then come out get the next client in the queue when they are available.

If the client’s membership has expired, the receptionist will arrange for the client to see a staff member to renew their membership. If they are a new client the receptionist will, explain the procedure for becoming a member and give them an application and ask if they have all their necessary paperwork. If they have an immediate need the receptionist may arrange for a one-day pass without registering. For a detailed description of what goes on in at the receptionist desk see Text Box V-1.

Text Box V-1: A Half Hour at Reception

To get a feel for OneStop customers and the services they seek we spent half an hour observing the receptionist greet clients. The receptionist, Bruce, is an EDD employee, casually dressed, with a cheerful and positive demeanor. He is also a UI navigator, but seems to enjoy the reception work. In explaining his job he says “I don’t believe in wasting any body’s time, I want to get everyone what they need.” At 9:05 am Bruce has 7 people in line:

Client 1: A new client, Bruce goes over the paperwork required to become a member, proof of address, right to work and an ID. Client leaves the center.

Client 2: Returning client. Bruce asks if he is a Vet. Client says yes and Bruce thanks him for serving, and says “You don’t hear that enough.” Client wants to see a skills specialist, Bruce puts him in the queue on the VOS computer system, client takes a seat in the waiting area.

Client 3: Wants to use the computers, is registered in the system, Bruce admits him. It is interesting to note that Bruce does not use the membership card but asks clients for the last four digits of their social security number. Enters them into the VOS system and verifies their eligibility.

Client 4: Client is on General Relief and wants to “sign up for work”, Bruce asks if he has his paper work. He does. Bruce puts him in the electronic cue.

Client 5: Client just wants to use the computer, Bruce checks eligibility and admits him.

Client 6: Client is here to see a skill specialist and use the computer. His membership is active. Bruce puts him into the electronic queue and tells him to go ahead and use the computer he will be called when a specialist is available.

Client 7: Client wants to use computer. Has membership card. Bruce admits him.

Client 8: Client wants to use computer. Has membership card. Bruce admits him. The computer freezes up and Bruce mentions this happens frequently. Computer starts to work again.

Client 9: Returning Client, wants to see Cindy. Bruce puts him the electronic queue. Client goes in to use computers while he waits.

Client 10: Client is late for the job club meeting. Bruce sends him to security guard to try and get into meeting late.

Client 11: Client wants to use a computer. His membership is expired in January. Bruce explains that he needs to meet with a skill specialist to renew his membership, puts him in the electronic queue.

Client 12: Client “needs stamp for a state office”. Bruce seems to understand this request. Client is not a member, Bruce gives him application to complete.

Client 13: Client applied on-line but did not printout application. Asks Bruce “what kind of things do you do here”, Bruce gives a brief explanation. Client leaves.

Client 14: Client is here for a “skills appointment”. Bruce checks that client is in system puts him in electronic queue.

Client 15: Client asks for Vivian. Bruce gets name and puts him in electronic queue.

Client 16: Client says she is a GAIN participant and wants to see Gloria. She has not been a member for two years. Bruce explains she must reregister. Client leaves.

All this takes less than half an hour.

Step 2: Meet with a Greeter

When the client has completed a paper application he or she will meet with a greeter. The Greeter works one-on-one with the client to make sure all the information they entered into the system is accurate. The Greeter also verifies documents such as selective service and right to work. They then explain to the client everything they need to know about the center. This process is the client’s orientation; done one-on-one, not in a group. Veterans and special needs clients are sent to specific Greeters, who have expertise with those groups. It is important to note that this OneStop does not conduct group orientations, all orientation is done one-on-one in a counseling mode.

Step 3: Meet With Program Specialists

Next, the client is sent to a Program Specialist who decides if a client will be enrolled in WIA. The Program Specialist maps out a plan of workshops and training for the client to follow. If they are not enrolled then the client is still allowed access to resources such as the resource room. A swipe card allowing access to the center’s resources is issued. The card is good for 30 days and automatically receives a 60 day extension every time it is used.

Step 4: Training and Workshops

Clients plans may call for them to attend specific workshops and training programs as directed by the Program Specialist. The client must follow the plan the Program Specialist has laid out in order to continue to receive services. Services are given until the client finds work or their training is complete. The center offers some training, but the majority of training is offered away from the OneStop by outside employers and agencies. Organizations like New Horizon, Professional Trucking, and United Education Institute offer classes in areas such as computer training, commercial driver's licensing programs, and programs in dental assistant, medical assistant, automotive repair and other fields. Clients may also receive degrees and certifications from accredited local State Universities.

One of the most popular workshops offered on a regular schedule in the center is the Job Club". See Text Box V-2 for a complete description of a job club meeting.

Text Box V-2: Job Club

The Transport City OneStop Job Club meets in a second floor conference room. The clients sit on the outside of a U-shaped table large enough to seat 20-25 people. The middle is open and is used by the leader to walk around while facilitating the meeting. At the front of the classroom is a white board where the Leader writes down the class's goal and key points. The meeting room has a view of the city.

The Job Club is Transport City OneStops's most popular workshop. Unemployed workers meet to discuss their job hunt. The club is run on a peer driven format. A OneStop staff member acts as a facilitator moving the meeting along and bringing up topics to discuss. The job club differs from the other workshops with its heavy reliance on the peer group. The goal of the club is not only to improve the work search skills of the clients, but to develop a networking group. The peer format also allows the client to see that the emotions and hardships they face seeking employment are shared by others.

The meeting begins with the job club leader introducing herself and then talking about how job club works. It is brief and within a few minutes she asks the group to voluntarily share their stories and backgrounds. When no one volunteers she talks about how important audience participation is for the job club and the job search process. Job seekers must learn to talk about themselves comfortably. This is a major theme throughout the meeting. With each activity, the direction and pace of the class are dictated by the audience.

The next hour is spent on different activities. The clients share their tips for job search including networking, interviewing techniques, and different mixers designed for the unemployed. A brainstorming session is used to share ideas and experiences about what they can do to improve their employment search. After a client shares an idea or experience, the leader elaborates on each topic. Topics such

as volunteering and informational interviewing are discussed. The leader then takes control of the group and has volunteers read aloud a small essay discussing common interviewing mistakes. She also read an email of a former client who was now employed.

The club's final activity is a 30 second commercial drill. The clients get a paper with a generic paragraph with blank spots to fill in information about themselves. Once filled out she has them break up into groups of four. Each person gives their commercial and then is critiqued by the group. The smaller groups were more helpful and engaged than in other activities involving the larger group, but the average person's commercial goes about 90 seconds. The clients give their commercial again with a hard 30 second limit and making changes based on the critiques they received. Presentations are much better and more concise the second time around as clients seem to feel more comfortable in front of their groups and have more practice with their pitches. Some clients think they must fit all their information into 30 seconds. They are reminded that this exercise is not to speed up speech, but to teach them how to give a quick, concise pitch. The groups disband and reconvene as the larger group and 5 members give their commercial to the class.

Step 4: Ongoing Case management

Fewer clients receive ongoing case management since the switch to integration. Now, there is limited case management once the program specialists have laid out the training plan for the client. There are two reasons for this change. The procedures for the program specialists now call for clients to be seen on a walk in basis, not assigned to a single program specialist. Program specialists are no longer responsible for certain clients making the clients harder to follow. The second reason for the reduction in case management is the larger number of people enrolled. It is simply not possible to provide regular case management to every enrolled client.

Step 5: Placement

The center provides placement services to all clients. Several business service specialists seek to place the clients with individual businesses looking for workers. The business service specialists seek out businesses who may be hiring and also respond to businesses calling the center looking for employees. Integration changed the way the business service specialists interact; placing them in functional teams of three. Recently, they have launched a virtual program resulting in businesses reaching out to the center more. Before the virtual program, they received about one call a month. Now, they receive a call once a week.

Step 5: Exiting

Clients are exited one of two ways. A hard exit occurs when the client notifies the center that they have found work and will not need their services anymore. A soft exit occurs when a

client has not used the center for 90 days and has not been in contact regarding finding employment.

Business Services

Business services were part of the ISD initiative. The business service staff participated in the planning of ISD and were initially part of the employment team. Business services moved to a team structure, three members, as part of integration. Before ISD business services were already jointly staffed by EDD and WIA, so the shift to ISD was not dramatic but did give them an opportunity to rethink how they worked together. Like other departments in this center, cubicles and offices of EDD and WIA business service staff are intermingled and names tags list just the center, not the agency the employee works for. Overall business service staff believe that ISD improved service for both the businesses and individual clients.

Business service staff reported no problems or issues with functional managers, and saw themselves as cooperating well with managers from both agencies. Both agencies share equipment and supplies. One business service staff person said, “I couldn’t walk up to a printer or fax machine or computer in the center and say, that one belongs to EDD or that one belongs to WIA”.

The business service staff works respond to companies who call in and also actively call out to companies to see if they can help them with their staffing needs. The outbound calling has generated business interest in the Center’s services. Over the last year, the center worked with over 30 businesses in the area. A recent viral campaign has increased the number of businesses contacting the center for employees. Before the campaign, about one business called in per month compared to the 1-2 per week since the campaign.

Overall the business services staff credits the integration in improving their department. The team structure allows the clients/businesses to be touched by more business services workers with different ideas and strengths. They believe both individual clients and businesses have received more prompt service, as their inquiries are handled by whoever is available.

Cost Analysis

The California Workforce Investment Board sponsored the development of a sophisticated Activity Based Costing system for OneStops. This system first identifies all the resources and costs that are “under the OneStop’s roof”. It then traces those costs to the activities that generated them and ties those costs to the services produced creating cost/per service measures. These costs are then benchmarked against other OneStops in the system¹⁶. Here we present the benchmarked costs for this OneStop. Job Seeker and Business Services costs are benchmarked separately.

The analysis begins by looking at the costs of each partner under the OneStop’s roof. In the Table below we see Transport City OneStops costs on the left side of the table compared to

¹⁶ A complete description of this project can be found in the projects report: *California OneStop System cost Study Report* (2007) Sacramento, CA: California Workforce Investment Board, available at www.calwia.org.

the costs reported by a state-wide group of OneStops on the right side of the table. In Transport City OneStop we see right away that partners actually account for 38% of all the costs in the OneStop. EDD which had \$1,716,990 in costs for program year 2008-09 accounts for 25% of all costs. A mixed group of other local partners accounts for an additional 13% of costs. Thus we can see that the Big City Local Area has been more successful than average in getting partners to contribute to the OneStops operations.¹⁷

Table V-I: Partner Contribution Report for Transport City One stop

Total Costs

	Your Dollar Amount	High Median and Low from State-wide Group of OneStops			Your Percentage	Median	Low	High
		Median	Low	High				
Total One Stop Cost	\$6,968,610	\$2,626,190	\$147,000	\$9,758,580	--	--	--	--
WIA Local Area Costs	\$4,349,575	\$1,368,900	\$380,438	\$8,534,000	62%	98%	26%	100%
Partner Costs:								
Aging and Adult		\$32,229	\$24,459	\$40,000		1%	1%	1%
Dept of Rehab		\$16,220	\$1,402	\$1,450,760		1%	0%	39%
EDD	\$1,716,990	\$1,253,480	\$17,023	\$3,418,940	25%	21%	1%	74%
Local Adult School		\$112,605	\$1,801	\$476,233		3%	0%	17%
Local College or University		\$33,550	\$450	\$2,177,200		1%	0%	26%
SBDC	\$4,900	\$71,950	\$4,900	\$139,000	0%	47%	0%	95%
Other Local Partner	\$897,145	\$29,984	\$2,600	\$2,614,140	13%	4%	0%	38%

Next we look at how cost broke down between the job seeker and business services processed within the OneStop. The tables show that in both cases WIA accounted for about 60% of the costs and partners contributed about 40 % of the costs. With mix of EDD costs and other local partner costs remaining roughly the same.

¹⁷ It is important to note that data base includes about 20 OneStops from around the state. They are volunteers and hence not a representative sample of all OneStops, but the benchmarks do provide some insights about how OneStops differ from each other.

Table V-2: Transport City One Stop Partner Contribution Report 2008-09 By Job Seeker and Business Service Process

Job Seeker Costs

	Your Dollar Amount	Median	Low	High	Your Percentage	Median	Low	High
Total Job Seeker Cost	\$5,194,091	\$1,711,460	\$69,500	\$7,587,580	--	--	--	--
WIA Local Area Costs	\$3,259,462	\$1,205,750	\$371,602	\$6,363,000	63%	98%	24%	100%
Partner Costs:								
Aging and Adult		\$32,229	\$24,459	\$40,000		2%	1%	2%
Dept of Rehab		\$16,220	\$1,402	\$1,450,760		1%	0%	42%
EDD	\$1,287,743	\$1,171,470	\$17,023	\$3,213,810	25%	19%	1%	73%
Local Adult School		\$110,130	\$1,801	\$476,233		3%	0%	20%
Local College or University		\$25,000	\$450	\$2,177,200		2%	0%	33%
SBDC		\$69,500	\$69,500	\$69,500		100%	100%	100%
Other Local Partner	\$646,887	\$29,984	\$2,600	\$1,934,630	12%	4%	0%	37%

Business Services Costs

	Your Dollar Amount	Median	Low	High	Your Percentage	Median	Low	High
Total Business Services Cost	\$1,774,519	\$257,249	\$8,836	\$1,774,520	--	--	--	--
WIA Local Area Costs	\$1,090,113	\$214,880	\$8,836	\$1,277,400	61%	100%	8%	100%
Partner Costs:								
Aging and Adult								
Dept of Rehab		\$8,000	\$8,000	\$8,000		10%	10%	10%
EDD	\$429,248	\$205,137	\$1,483	\$1,076,090	24%	69%	2%	100%
Local Adult School		\$1,500	\$1,500	\$1,500		1%	1%	1%
Local College or University		\$2,100	\$2,100	\$2,100		2%	2%	2%
SBDC	\$4,900	\$37,200	\$4,900	\$69,500	0%	45%	0%	90%
Other Local Partner	\$250,258	\$266,241	\$160,349	\$679,506	14%	20%	14%	38%

The cost analysis shows that Transport City OneStop had almost \$7million in costs in the 2008-09 program year, the first year of ISD, substantially more than the median sized OneStop in the benchmark group. This includes WIA costs, EDD costs and all other partners in the OneStop. About 75% of these costs were incurred serving job seekers and the remaining 25% were attributable to business services.

When we look at the activities that generated the costs (see “Cost By Activity” section of the table) we see that the distribution of costs reflects the focus of assessing skills, in-depth assessments and the developing individual plans each accounted for about 10% of costs, orientation and initial assessment consume an additional 8% of costs. This indicates the commitment this OneStop has made to focusing and developing client skills. These figures are more than twice the median for other OneStops.

Table V-3: Transportation City OneStop Job Seeker Costs By Activity with Benchmarks 2008-09

	Transport City Costs	Median	Low	High
Total Cost	\$6,968,610	\$2,730,220	\$147,000	\$9,758,580

Job Seeker Process

	Transport City Costs	Median	Low	High
Job Seeker Total Cost	\$5,194,091	\$1,833,220	\$69,500	\$7,587,580
Percentage of OneStop Total Costs:	74.5%	81.7%	47.3%	100%

Cost Per Activity	Transport City Dollar Cost	Your Percent of Total Cost	Median Percent of Costs	Low Percent of Costs	High Percent of Costs
Outreach and Recruitment	\$283,973	4.1%	6.5%	0.09%	17%
Orientation to OneStop and Initial Assessment	\$577,089	8.3%	5.7%	0.9%	26%
Self Service- Job Search Information and Support	\$367,266	5.3%	5.6%	1.4%	64.4%
Coaching: for job search information and support	\$249,477	3.6%	8.4%	0.7%	15.1%
Workshops: Job search and support	\$582,384	8.4%	5.5%	0.9%	21.6%
Job Seeking Networks	\$72,149	1.0%	1.7%	0.3%	8.9%
In-Depth Assessment	\$700,518	10%	3.3%	0.5%	47.3%
Individual Service Plan, such as IEP	\$700,518	10.0%	5.3%	1.2%	22.5%
Case management	\$271,448	3.9%	9.7%	2.2%	36.7%
Counseling	\$181,932	2.6%	4.1%	0.7%	8%
ITA/ OJT	\$293,351	4.2%	4.3%	0.5%	25%
Training and Education	\$75,780	1.1%	3%	0.7%	10%
Support Services	\$176,273	2.5%	3.9%	0.5%	11%
Placement Assistance	\$661,928	9.5%	8.8%	0.6%	27.3%
<i>All Job Seeker Activities</i>	<i>\$5,194,091</i>	<i>74.5%</i>	<i>81.7%</i>	<i>47.3%</i>	<i>100%</i>

After we developed costs for each activity we measured the number of service units produced for that activity and then calculated the cost per unit of activity produced. Table 2

shows the data for this OneStop with benchmarks¹⁸. Overall the OneStop had average costs for most of the services it produced. For example, the cost per individual job seeker served was about \$53 compared to a median of \$54, cost per client visit was \$9.47 about a dollar below the median of \$10.60. Similarly cost per workshop was almost exactly the median. This OneStop did not report any clients getting training so no cost calculations related to training were made.

Table V-4: Transportation City Cost per Unit of Job Seeker Service with Benchmarks 2008-09

Cost Per Unit of Service	Transport City Dollar Cost Per Unit	Median Cost Per Unit of Service	Low Cost Per Unit of Service	High Cost Per Unit of Service
Cost per individual Job Seekers served (Enrolled Client + Universal Clients. Unique individuals)	\$16	\$20	\$1.79	\$1,253
Cost Per new Job Seeker	\$53	\$54	\$2.07	\$736
Cost Per Job Seeker Visit	\$9.47	\$10.61	\$0.60	\$67
Cost Per Job Seeker Service Event (e.g. faxed a resume, accessed career information on internet)	\$2.96	\$10.61	\$0.77	\$47
Cost per one-on-one coaching events	\$469	\$69	\$2.23	\$2,820
Cost Per Workshop	\$1,012	\$1,016	\$113	\$4,533
Cost Per Person attending	\$100	\$66	\$4.89	\$572
Cost per Job club or network member	\$136	\$1,070	\$65	\$5,222
Cost per person attending	\$79	\$161	\$34	\$1,431
Cost Per Job Seeker completing comprehensive assessments	\$150	\$153	\$14	\$1,124
Cost Per IEPs or other formal plans created	\$193	\$173	\$10	\$675
Cost per client getting case management	\$17	\$183	\$26	\$1,377
Cost per meeting with case manager	\$1.58	\$116	\$8.61	\$6,807
Cost per client session	\$0.00	\$203	\$6.16	\$13,615
Cost per client with ITA or OJT	\$504	\$840	\$27	\$5,640
Cost per client receiving training/education	\$0.00	\$346	\$3.41	\$1,770
Cost per hour of training/ education	\$0.00	\$66	\$1.14	\$8,337
Cost per client receiving support services	\$250	\$244	\$16	\$2,820
Cost per client placed (entered employment)	\$42	\$571	\$92	\$8,401

Table V-5 shows that this OneStop is a high volume site. The Center served 16,760 clients compared to a median of 7,558. Data on the number of job seeker visits shows that while this center served a large number of job seekers the average client only visited the center between 4 and 5 times, generating over 38,000 client visits. Similarly the center reported that 5,776 people attended a workshop indicating that only about a third of clients at most attended a workshop. On the other hand the center reports 171,539 meetings with case managers, reflecting this centers focus on the individual advisement of clients.

¹⁸ Note all data is self-reported by OneStop. In some cases while the center reported costs for a particular activity, such as job seeking networks or job clubs, they did report the amount that service produced so not cost per unit of service could be produced.

Table V-5: Transportation City Units of Job Seeker Service with Benchmarks 2008-09

Unit of Service Produced	Transport City Number	Median Number	Low Number	High Number
Total Number of individual Job Seekers served (Enrolled Client + Universal Clients. Unique individuals)	16,760	7,558	11	40,000
Number of new Job Seekers	10706	4992	90	11949
Number of Job Seekers visits	38800	16483	30	120000
Number of Job Seeker Service Events (e.g. faxed a resume, accessed career information on internet)	124144	14319	5.0	94050
Number of times one-on-one coaching events occur	531	5100	20	40000
# of Workshops	575	187	8.0	800
# of People attending	5776	2212	100	13391
# Job club or network members	530	58	8.0	2020
Total Job club or network attendance	908	300	25	1500
# of Job Seekers completing comprehensive assessments	4665	383	20	6104
# of IEPs or other formal plans	3624	590	20	8250
# of clients getting case management	15578	599	30	6659
# of meetings with case manager (staff/ client ratio may be a meaning full measure as well)	171539	2460	5.0	11886
# of client session	0	560	5.0	5000
# of clients with ITA or OJT	582	127	10	2062
# of clients receiving training/education	0	168	20	3270
# of hours of training/ education	0	480	8.0	26576
# of clients receiving support services	703	303	31	1305
# of clients placed (entered employment)	15578	219	29	4352

As we noted before business services accounted for over 25% of total costs or about \$1.8 million. This is far above the benchmark group both in terms of percent of cost, bench mark 11% and dollars spent, benchmark \$255,142. The largest Business Service costs were job development and outreach and marketing to businesses with between them accounted for over 15% of all OneStop costs. Other significant Business Service Costs were Rapid Response, about 5% and Mass Hires and Job Fairs about 4.5%.

Table V-6: Transportation City Cost of Business Services with Benchmarks 2008-09

Business Services Process

	Transport City Cost	Median	Low	High
Business Services Total Cost	\$1,774,518	\$255,142	\$8,836	\$1,349,8800
Percentage of OneStop Total Costs: 25.5%		11.1%	1.8%	52.7%

Cost Per Activity	Transport City Dollar Cost	Transport City Percent of Total Cost	Median Percent of Costs	Low Percent of Costs	High Percent of Costs
Outreach and Marketing	\$427,687	6.1%	2.7%	0.3%	13.3%
Rapid Response Assistance	\$358,377	5.1%	1.5%	0.08%	7.3%
Mass Hires/ Job Fairs	\$317,172	4.6%	1.5%	0.06%	10.7%
Workshops	\$53,749	0.8%	0.6%	0.01%	50%
Business Consulting	\$15,749	0.2%	0.6%	0.06%	4.5%
Business Center Service	\$3,300	0.05%	0.5%	0.01%	2.1%
Job Development	\$598,482	8.6%	3%	0.3%	18.2%
<i>All Business Services Activities</i>	<i>\$1,774,518</i>	<i>25.5%</i>	<i>11.1%</i>	<i>1.8%</i>	<i>52.7%</i>

The following table shows the costs per unit of Business Services delivered. The data here show that Business Services at this OneStop tend to be above the benchmark group, for example the average cost per employer assisted is \$7,167, compared to a benchmark figure of \$1,175. Similarly cost per mass hire event was \$5,286 compared to \$1,943. Reasons for these cost differences are unclear from our field work. It may be that to reach and serve employers in this urban area are higher than in the state as a whole.

Table V-7: Cost per Unit of Job Seeker Service with Benchmarks 2008-09

Cost Per Unit of Service	Transport City Dollar Cost Per Unit	Median Cost Per Unit of Service	Low Cost Per Unit of Service	High Cost Per Unit of Service
Cost per employer contacted	\$57	\$133	\$11	\$7,958
Cost per employee assisted	\$238	\$48	\$1.10	\$1,500
Cost per employer assisted	\$7,167	\$1,175	\$37	\$19,652
Cost per mass hire event	\$5,286	\$1,934	\$69	\$38,747
Cost per applicant interviewed at mass hire events	\$62	\$54	\$3.06	\$1,703
Cost per applicant hired from mass hires events	\$0.00	\$587	\$27	\$8,516
Cost per Job Fair	\$5,286	\$5,477	\$452	\$80,091
Cost per Job seeker participating in job fair	\$288	\$52	\$2.64	\$425
Cost per workshop	\$0.00	\$1,807	\$296	\$5,557
Cost per business attending workshop with consultation	\$0.00	\$248	\$14	\$3,865
Cost per company serviced	\$0.00	\$512	\$27	\$7,200
Cost per hour of consulting	\$0.00	\$207	\$34	\$2,400
Cost per business served	\$0.00	\$179	\$14	\$1,619
Cost per job developed	\$0.00	\$334	\$15	\$3,865

Unit of Service Produced	Transport City Number	Median Number	Low Number	High Number
Number of employers contacted	7500	150.0	17.0	3015.0
Number of employees assisted	1500	532.0	5.0	13069.0
Number of employers assisted	50	26.0	2.0	322.0
Number of mass hire events	60	13.0	3.0	144.0
Number of applicants interviewed at mass hire events	5100	910.0	20.0	3100.0
Number of applicants hired from mass hires events	0	100.0	10.0	1300.0
Number of Job Fairs	2	6.0	1.0	50.0
Number of companies participating	28	50.0	1.0	840.0
# of Job seekers participating in job fair	1100	1500.0	50.0	8000.0
# of workshops	0	18.0	1.0	45.0
# of businesses attending	0	50.0	11.0	360.0
# of companies serviced	0	74.0	5.0	3038.0
# of hours of consulting	0	155.0	15.0	360.0
Number of businesses served	0	82.0	1.0	322.0
Number of jobs developed	0	300.0	35.0	7000.0

Lessons Learned

In our view ISD is a success in Transport City, in that there is a strong collaborative relationship between EDD and the Local WIA program. The staff has collaboratively rethought the process they use to deliver services and seem to manage the process professionally and effectively. Staff views ISD as a positive innovation and feel good about the number and quality of services they are delivering. Transport City's ISD experience offers a number of lessons and raises some challenging questions for the implementation of ISD.

First, everyone we talked to agreed the history of co-location, successful past collaboration and positive personal relations between top WIA and EDD managers provided a foundation that made the implementation of ISD relatively easy. We would add to this the fact that the decision to become an ISD site seemed to have truly been made in a collaborative manner set a positive context as well.

This site seemed to be particularly thoughtful about how they prepared for the launch of ISD. The Local Area invested resources in team building and building trust between EDD and WIA staff before beginning the hard work of implementing ISD and that seemed to pay off. At this site it appeared that both EDD and WIA staff saw themselves as a single team and presented themselves that way to the clients.

We were also impressed with the degree to which this site went to reshape its process to reflect the demands of ISD. This local area literally redesigned how it used its space and how the space was decorated to communicate with clients and make the process flow smoothly. The commitment to totally rethinking the operation of the OneStop was impressive.

This site also showed a strong commitment to sharing a data system. Both WIA and EDD committed to using the Virtual OneStop (VOS) system exclusively so that scheduling and recording data could be standardized throughout the program. When EDD needed specific data on veterans the local areas paid to add the needed model to VOS rather than use multiple systems.

Staff morale struck us as particularly high at this site. Many staff we interviewed reported they really enjoyed the collegial relationship with staff from the other agency and found themselves motivated to work hard to make ISD a success. This shows us the process of implementing and working ISD could have a positive impact on the work environment for staff if it is well managed.

This site raises several issues that will need to be explored in the larger study. First, despite a big commitment to a single data system and substantial investment in recording data, we found that management of this site was not data driven. Few regular reports are produced and performance data are not tracked to the OneStop level. It is

unclear to us why this well managed site is not focused on objective measures of process and performance.

We also note the paradoxical outcome that by trying to enroll all clients in WIA the actual number of clients served declined and that despite an increase in funding and enrollments the number of people receiving training declined. We are unclear if these trends are unintended consequences of huge effort it takes to launch ISD or if something else is at work.

VI Alpha OneStop Case ISD Meets the High-Tech Economy

VI Alpha OneStop Case ISD Meets the High-Tech Economy

Introduction

When you enter the ALPHA ONESTOP you immediately feel it's unique physical layout and organizational climate. Ample parking and a campus-like environment provide an open and welcoming atmosphere. When a customer enters the door, each is immediately greeted by someone from the Welcome Desk staff (the Welcome Desk is jointly manned by WIA and EDD personnel who stand next to each other and share welcoming responsibilities; although each group has their own "welcome" workstation and they do not appear to ever switch positions). Staff come out from behind their desk to help customers who appear either reluctant or confused; in every case, staff communicate in a warm, friendly and empathetic manner. People are helped quickly and efficiently, but always with a sense of caring and understanding. Once their needs are identified, customers are promptly sent to someone who can help them. The professional dress and manner of the staff convey a sense of confidence to new customers and set a positive tone for the OneStop services. There is, however, a sense that this OneStop is more tailored to white-collar professionals than to blue-collar workers (this probably reflects the large number of professionals in its service area).

The ALPHA ONESTOP is located in an area with a large base of high technology companies in an extended suburban/ urban environment. The economy of the area served by this OneStop was severely impacted by the recent recession (internally they refer to the economic downturn as "the great recession", an allusion to the great depression of the 1930s). ALPHA ONESTOP is large, consisting of a WIB organization with over 40 WIA employees (funded through the local Workforce Investment Board) and 8 EDD (California Employment Development Department) employees, as well as many volunteers from the community and from among the unemployed professionals who contribute time and energy to the OneStop. This particular OneStop is the only one operated by the Local WIA program. Physically the site is located in a series of campus-like buildings adjacent to the local City Hall and the ALPHA ONESTOP works for a seven-city consortium within a large County. Because of its location it tends to serve a better-educated customer base than most OneStops in the state. Approximately 50% of customers coming to the ALPHA ONESTOP have university degrees and many have advanced degrees.

The ALPHA ONESTOP has a strong reputation in the community and has done an excellent job in recruiting professionals for its staff. Many of these professionals have advanced degrees in relevant fields such as counseling and human resources and some continue to have private practices outside their work at THE ALPHA ONESTOP (many WIA employees work on a part-time basis). The current director has significant WIA experience and is viewed very positively by the staff as well as by the local EDD manager. This positive acceptance and support are due in large measure to the director's leadership style that is seen as participative, inclusive, and customer oriented.

Among a variety of client services, ALPHA ONESTOP provides support for two very different job clubs. The first, White Collar Meet Up, is the local chapter of Experience Unlimited, is an interactive career resource center for professionals seeking work in the local

area. It focuses primarily on individuals with university degrees and experience as managers or in other “professional occupations”. For the most part, participants in White Collar Meet Up organize and manage weekly sessions and its smaller support groups themselves with some support from the onestop staff. When you attend any of their meetings it is obvious that most of White Collar Meet Up’s members have considerable management and organizational experience. The general tone of the meetings, both large and small, is positive, proactive and upbeat (a fuller description of White Collar Meet Up is provided later in the case).

A second job club is aimed at individuals with little job experience, many who are or have been on welfare; the majority of these individuals are women. In this group the atmosphere is noticeably less positive. This second job club is a CalWORKS program and the customers are not enrolled into WIA unless they choose to access those services. They are not as proactive, are less involved in their own job search, and perhaps for these reasons seem to get less attention from the ALPHA ONESTOP’s staff.

Although the second of these job clubs was not included in the learning lab’s integration process, in many ways the differences between these two job clubs, their customers, and how they interact with each other and the staff, reflect the challenges faced by ALPHA ONESTOP in trying to integrate two different organizational groups and provide services to these dissimilar populations of customers. The difficulty of melding the different priorities and cultures of EDD (the California Employment Development Department) and Local WIA (Workforce Investment Act program) staff, and these underlying differences in organizational culture, staff priorities, focus, and client needs are central to both the promise and problems of implementing ISD.

On entering customers immediately see the Welcome Desk that is manned both WIA and EDD staff. The building has an open floor plan and, at least from the customers’ perspectives, is not noticeably differentiated between WIA and EDD staff. The physical layout of the ALPHA ONESTOP is depicted in Attachment 2.

Introduction of ISD

Integrated Service Delivery (ISD) was introduced at THE ALPHA ONESTOP in June of 2008. The prior director volunteered this site as a “learning lab” for implementing Integrated Service Delivery. Staff believe that the former director had a strong commitment to customer service, in ALPHAtion and desired to keep THE ALPHA ONESTOP at the leading edge of new service delivery strategies and to shape the way ISD was implemented.

Most ISD functions, with the exception of White Collar Meet Up (discussed later) and training workshops, take place in a large building that has an open floor plan with staff cubicles or work stations that are easily accessible by both co-workers and customers. Overall the physical setup of the OneStop is very welcoming to customers (see floor plan diagram in Attachment # 1) and facilitates communication among WIA and EDD staff.

The introduction of ISD involved a major shift in the service philosophy of both WIA and the local EDD staff. Before introducing ISD, THE ALPHA ONESTOP enrolled a relatively

small number of customers—3,348 in 2007-08—using a case management approach, and with each customer working with a single case manager. The ISD model is based on the enrolling and serving all customers who come to the OneStop. In the first year of ISD, 2008-09 the OneStop enrolled almost four times as many customers—12,184.

After the first full-year of using the ISD model, the ALPHA ONESTOP had a 61% increase in new customers, a 44% increase in client visits, a 160% jump in drop-in appointments with career advisors, and a 266% increase in workshop attendees. Rather than enrolling only a small number of select customers to work intensively with case managers through scheduled appointments, almost all customers that come through the door are enrolled and provided access to all services on a drop-in basis. While this has increased the volume of customers being served by THE ALPHA ONESTOP, it seems to have also increased the expectations of the customers with regard to the variety and quality of services that they will receive. This has also increased the need for staff of both WIA and EDD to coordinate and work effectively together. The goal of ISD, as stated by the director and the head of Job Seeker Services, was to improve performance in three areas (although specific goals in each of these areas were not defined):

1. Cost,
2. Customer satisfaction, and
3. Outcome measures

In addition to improving performance, the introduction of the ISD model was intended to enroll more people and therefore give the ALPHA ONESTOP better evidence of the volume of services they provide.

ISD Process and Services

The ALPHA ONESTOP offers a broad range of services to all customers that come through the door. As stated earlier, their general goals are to enroll everyone who comes to the center for services and to make those services as customer friendly as possible. The process includes two major steps—registration and job search services, along with a number of other support resources such as workshops, a professional networking program called White Collar Meet Up and access to a variety of other WIA and EDD resources.

Registration

Registration begins when customers walk through the front door of the ALPHA ONESTOP. The welcome desk is one of the few areas where there has been real integration of the WIA and EDD staff (although each group has a specific place at the welcome desk). From the welcome desk customers are sent through a 3-step registration process—a group orientation, eligibility verification, and a welcome appointment with a career advisor (see chart below). A more detailed description of ALPHA ONESTOP's ISD Customer Flow Model is provided in

Flow Chart VI-1.

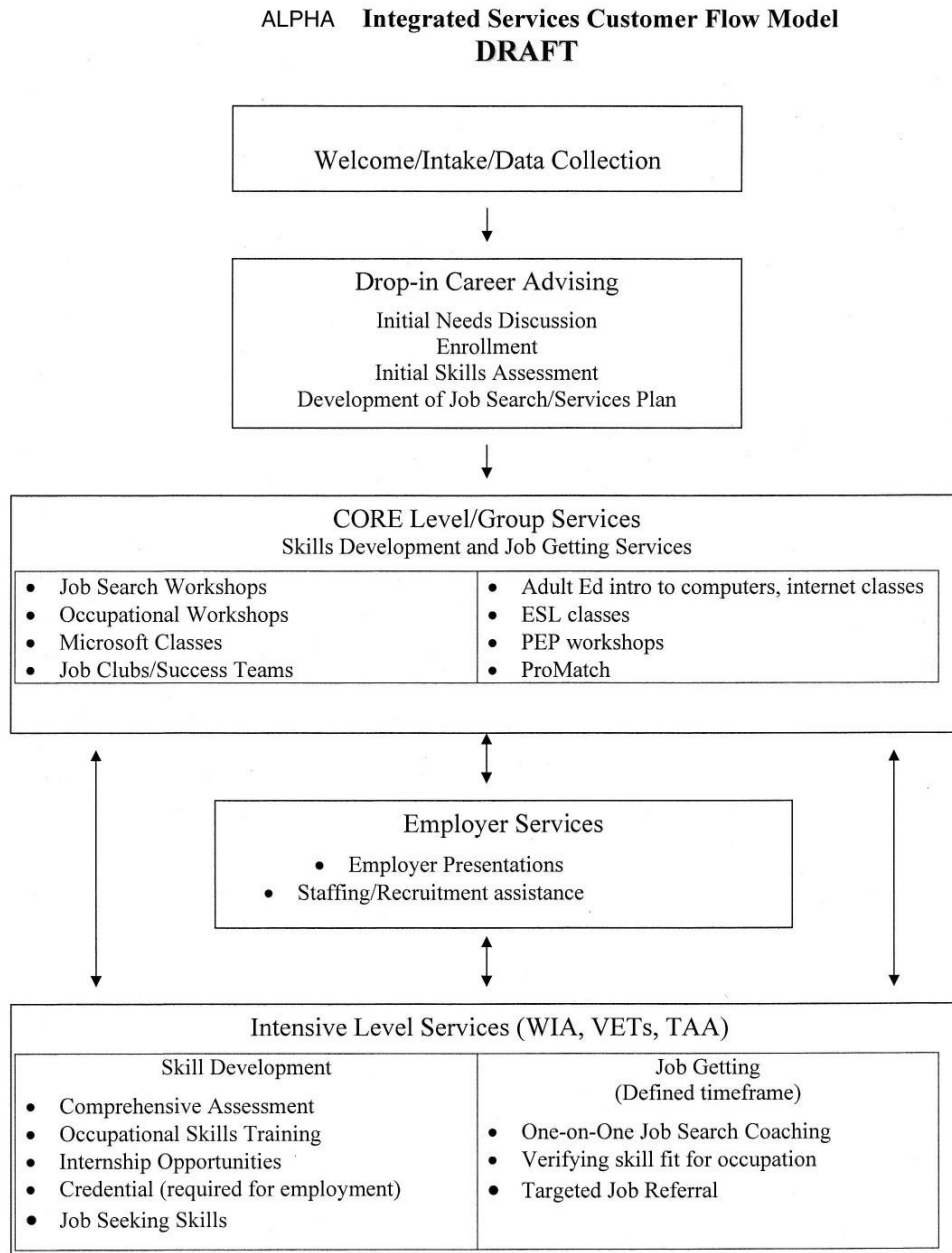
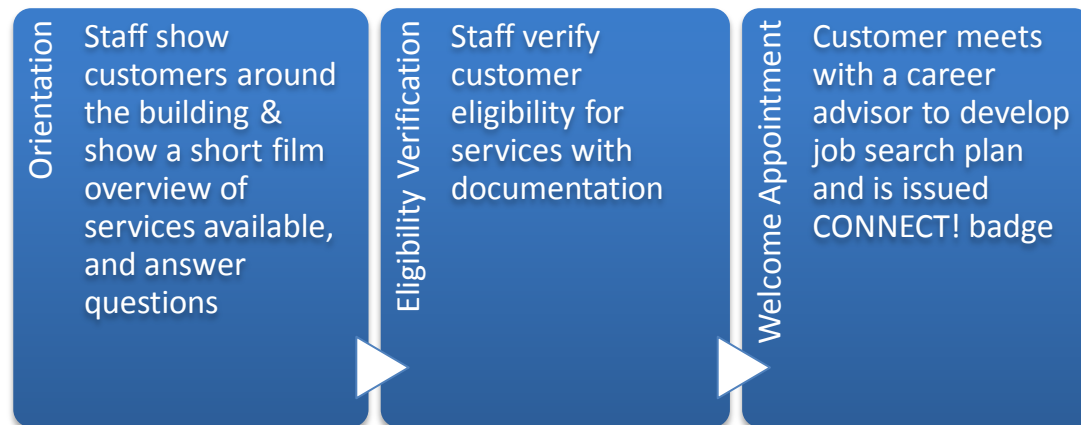


Figure VI-1: ALPHA's Three-Step Registration Process



Approximately 90% of customers who come to the ALPHA ONESTOP are enrolled and entered into the system. The major barrier to enrollment is faced by potential clients is lack of documentation—customers either don't have the right paper work with them or they fail to come back with the required documents in order to complete the enrollment process. An individual who does not have the necessary documents on the first day will get a “day card” that allows them to use ALPHA ONESTOP services for that day. To continue using the services in the future they must return with the proper paperwork to complete the enrollment and registration process.

An important part of the enrollment/registration process is to get people into the data system (CALJOBS) in order to provide better service but also to assure that the onestop “gets credit for it”. Therefore, all customers are encouraged (but not required) to open a CalJobs account. If a customer is collecting UI and has not opened an account, they are required to do so. Currently staff enter data into their local data management system and that data is batched and uploaded to JTA once per month.

Job Search Services

The Job Search Services process involves four steps that are handled by a WIA career advisor (see detailed description in Attachment #1). The career advisor enters the information for each customer into the local data system so that it is documented and available to all other career advisors, enabling follow-up advisement on a drop-in basis with whoever is available at the time. This permits more flexibility for both the WIA career advisors and the customers, as well as some perceived value-added for the customers—one customer indicated that an advantage of seeing different people on each visit was that it allowed for a “different set of eyes” to look at the file and the job search materials and provide help in developing a custom job search strategy.

Training Workshops

THE ALPHA ONESTOP offers a wide variety of workshops (approximately 40—see Appendix for a description of the workshops) for individuals seeking to improve their skills or in career planning, job search, resume preparation, interviewing, networking, computer skills, as well as disability services. Highly trained and competent professionals who have significant experience in the subjects conduct these workshops. A number of customers attending the workshops have compared them very favorably with similar workshops given by other organizations that charge a fee for similar training.

White Collar Meet Up (WCMU)

White Collar Meet Up (a chapter of Experience Unlimited—a professional networking group sponsored by EDD) is a unique joint project, co-funded by the local WIB and EDD, is a member self-directed program for making connections, identifying resources, information, and encouragement to engage in a successful job search. WCMU has a rotating membership of 220 individuals who remain in the group for six months. The entire group meets once a week in the local City Council Chambers where individuals share information and success stories and guest speakers make presentations related to the job search process. Members are also placed in small “success teams” of 6 individuals that meet once a week to provide advice and support. This job search support group is aimed primarily at professionals and focuses on mutual support and developing networking skills. The group has a fairly extensive website with information about its activities, how to join and other resources for its members. It appears to be quite successful in helping its members find employment and there is a waiting list to get in. A description of the program is provided in the box below.

White Collar Meet Up—High Enthusiasm and High Success

One of the most successful inALPHAtions by the WIA organization at Alpha is the White Collar Meet Up Job Club. This professionally oriented job club enrolls a maximum of about 225 individuals at any given time. Weekly White Collar Meet Up meetings are held in the local City Council Chambers. The room has a capacity of 200 and provides the job club with a professional setting for its meetings. There is a long wait list to get into White Collar Meet Up and, after their 6 months membership expires, individuals are replaced by new members from the wait list.

There is a palpable sense of energy and excitement among the members of White Collar Meet Up. Our guide at the meeting was Steve, a member of the job club. Steve is a laid-off engineer who has been looking for a job for well over one year. In spite of his own personal problems, he was enthusiastic to be a part of the club and communicated this optimism to others about both the job market and their future prospects. He pointed out several other club members who were either still looking for employment or who had recently found a job but were coming back to tell their story or encourage or help others. These individuals included other engineers, an attorney and other equally well-educated professionals. In spite of his outward optimism and concern for others, there was sense that he was uncertain about his own future job prospects.

After a quick chat we sat down in comfortable seats at the end of the City Council Chamber. An EDD employee sat next to us; she helped with the logistics of the meeting and worked with a member of the WIA staff. Both members of the OneStop seemed genuinely committed to the job club and its members.

The meeting started with a member announcing that almost 40 White Collar Meet Up members had found jobs in the previous month (March 2010). Then 2 members told success stories about their job search and suggested tips on how to find a job to the other members. Then members started lining up on the sides of the hall for a networking session. Each of these members walked to the microphone and told about a lead that they had or about the company that they wanted to work for and asked if anyone there had any leads for them. People in the audience who had leads or needed leads, held up their business cards; ushers (other members assigned to do usher tasks that day) collected the business cards and gave them to the person who had just announced an opportunity or contact. After the networking session the members-organizers announced upcoming workshops and asked if anyone could volunteer to teach some additional workshops.

Overall, the meeting had a very good vibe and we could feel the energy and optimism that permeated the room. White Collar Meet Up seemed to provide its members with both increased job opportunities and emotional support. It also showcased the effective cooperation of WIA and EDD staff.

LinkedIn

ALPHA ONESTOP has adopted the LinkedIn business-oriented social networking site as a key tool for job search. The OneStop encourages all those who could benefit to join LinkedIn and also provides targeted workshops to help customers maximize their benefits from this business-oriented social networking site (see Attachment 3). This resource has proved especially productive for the professionals that make up almost half of the onestop's customers.

Integration—Implementation Challenges, Barriers, & Issues

In practice, integration has proven more difficult to implement than originally anticipated. In attempting to integrate WIA and EDD staff, a number of issues surfaced that created challenges and barriers to full implementation of the ISD model. These tended to fall into four categories: organizational philosophy and structure; organizational cultures; data systems; and the unemployment insurance (IU) issues.

Organizational Philosophy and Structure

WIA personnel and EDD personnel differ in terms of their background and skills, their pay structure, their operational goals and priorities, their management structure and their organizational culture. As mentioned earlier, most WIA employees are professionals, many with advanced degrees in their areas of expertise. Many of these professionals are part-time employees of the ALPHA ONESTOP and maintain a private practice or other outside employment. As such they are more professionally oriented and less dependent on their ONESTOP affiliation than are the EDD employees. EDD employees, on the other hand, are State of California employees and hired through a standardized procedure and their own career progress is through the ranks of the EDD with clear career ladders and a variety of long-term benefits (e.g. health and retirement). These career ladders often require EDD employees to change location if they seek promotion. This in turn can engender less identification with, and commitment to, the ALPHA ONESTOP and the local community than for WIA employees. In addition, in most cases, EDD employees are paid significantly less (in the neighborhood of 33% less) than the WIA employees sharing their work place.

ALPHA employees are selected and hired for specialized functions in which they have highly technical knowledge (such as career counseling) and tend to perform only that function at the ALPHA ONESTOP. EDD on the other hand has fewer staff and a number of functions that are not related to ISD implementation but that must nevertheless be performed. Therefore EDD staff are expected to perform multiple functions in the course of their daily activities. In some cases EDD staff expressed that they were “torn by split responsibilities between EDD responsibilities and integration with WIA functions.” Also, EDD has perceived ALPHA as being somewhat resistant to cross-training EDD staff on WIA functions and this has led to “frustration for (EDD) Staff.”

The relationship between the Director and WIB Board reflect some changes to organization philosophy and structure that are having a positive impact on the operation of the ALPHA ONESTOP. The director has implemented a very participative and open approach to

decision making with the ALPHA Board. This was obvious during a board meeting that was characterized by very open and frank discussions of issues and problems. the board's meeting was characterized by high involvement and a collaborative decision making and decisions were arrived at through consensus.

Data Systems

One recurring theme through many of the interviews was the expression of frustration with existing data systems at all levels—in terms of capabilities and compatibility. This local ONESTOP site, like several others in the state, uses a proprietary local data management system that was described by one individual as “ready to die.” Although this system is able to send data to the JTA system used state wide to record and process WIA data by EDD (ECMS), it is done through monthly batch processing and not all the data reported by local data system maps completely onto JTA. This creates a serious problem because one of the major goals of ISD is to simplify the data entry, records keeping, and outcome performance reporting functions. The local data system makes achieving that goal more difficult. Another issue related to the data system, although not caused by it, is the conflict between the state's goal of going “paperless” and the conflicting requirement by the federal government to maintain paper records for conducting audits of how federal funds are used and whether they meet program criteria.

Organization Cultures

EDD and the Local WIA staff at Alpha ONESTOP appear to have markedly different organization cultures, particularly when you consider each organization's priorities, control and reward systems, and hierarchy. One EDD person expressed their initial concern this way: “Are we going to lose our identity and be absorbed?” In addition the two organizations are different in terms of number of employees—40+ for WIB staff and 8 for EDD. This creates an imbalance in the perceived power and influence of the two organizations.

Based on observations and interviews the differences between the WIA and EDD organization cultures might be characterized as shown in the following table—Table VI-1.

Table VI-1 ALPHA EDD v. WIA

Cultural Dimension	Local WIA	EDD	Impact of Δ
Structure	Flexible & flat	Bureaucratic & hierarchical	Some conflict especially since they report to different managers
Support	High management and peer support	Low-moderate management and peer support	Potential trust issues
Risk	Encouraging of innovation	Rule & compliance oriented	Possible conflict over how to achieve goals
Cohesiveness	Culture of teamwork And cooperation	More individualistic	Focus on team outcomes vs. individual outcomes
Outcome Orientation	Process and results oriented	Process and procedure oriented	Results vs. procedure orientation creates conflicting priorities

While both groups see integration as a worthwhile goal and have made significant efforts to work as an integrated team, the cultural differences between them, along with other factors such as data systems and pay differentials discussed above, have resulted in integration falling short of the goals originally set out by the program. Several other factors have created a cultural divide.

Barriers to Integration

A number of issues have created barriers between WIA and EDD staff. In general, WIA staff do not perceive the EDD personnel as having the necessary “skill set” to perform all the functions provided by the better educated and experienced WIA staff, particularly in their areas of specialization. In addition WIA staff pay ranges (from \$25-30 per hour) are significantly higher than those of EDD (\$14-20 per hour). This helps create a “class difference” between the two groups. In addition the recent furloughs, imposed on EDD because of the state budget crisis, have further exacerbated the perceived (and real) pay differentials. Other factors creating a cultural divide are the asymmetry in the sizes of the two units (approximately 40 for WIA and 8 for EDD) and the differences between them in terms of age and education. Many EDD staff are in their 60s and 70s, much older than WIA staff and WIA staff are more likely to have advanced degrees and experience working in other settings.

Finally, although the purposes and intent of ISD are clear to everyone in both WIA and EDD staff, the specific operational goals of integration goals have never been sufficiently operationalized in terms of specific outcomes and measures, making it difficult for individuals to focus their activities and problematic for managers to evaluate the degree of success, or even progress, in achieving those goals.

As a result, although the two staffs cooperate and seem to get along on the surface, there are a number of indicators that the integration has fallen short of expectations:

1. The only function that is meaningfully integrated is the Welcome Desk.
2. WIA and EDD staff do not cross-socialize in the break room—they tend to sit and eat at different tables.
3. Only one EDD staff member has been qualified to conduct one of the center's workshops and, in practice, does not conduct them on a regular basis.
4. EDD staff perceive that "they are not valued except when their partner needs them."
5. EDD staff perceive WIA staff as being more interested in "unemployed professionals" and not in blue collar or other non-professional customers.
6. The EDD supervisor is responsible for a large geographical area with multiple sites and is not "full-time" at the ALPHA ONESTOP.

The Unemployment Insurance (UI) Issue

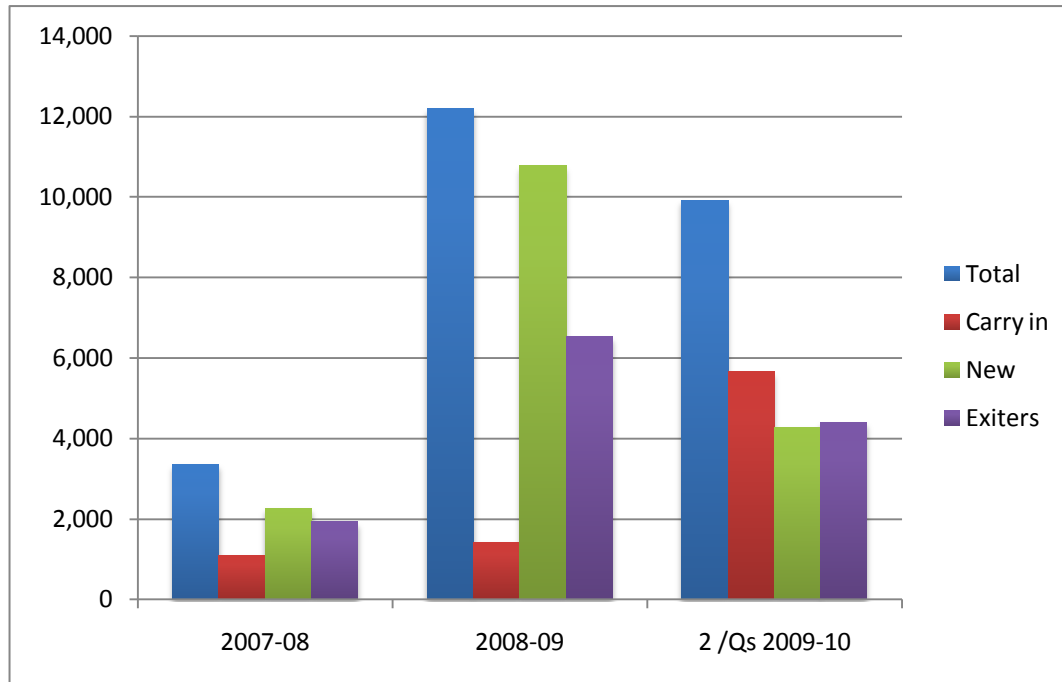
Unemployment insurance has been at the root of many problems at the ALPHA site. A significant number of customers come to the ALPHA ONESTOP seeking UI information because there is a large EDD sign at the entrance and they believe they can get information about their unemployment insurance there (the UI function within EDD is handled by a different division). Customer frustration has also been driven by the recent change in EDD to completely manage the UI function online or by telephone with no actual offices that unemployed workers can go to if they have specific questions or problems. This frustration has been exacerbated by technical and capacity difficulties of these remote systems. In addition, not all those eligible for UI know how to access the information online and the telephone lines often require an excessively long wait and callers are subject to being disconnected. This customer service problem has also been made worse by the lengthy recession and historically high unemployment rates leading to larger numbers of claimants putting a strain on the online/telephone systems response system.

In addition WIA staff are not sufficiently knowledgeable on UI issues and were not initially permitted to be cross-trained on unemployment insurance. This further reduced the already low perception of integration between WIA and EDD. It also has created an extra burden for both EDD and WIA staff since neither was sufficiently trained in all UI issues and WIA staff is not supposed to answer questions on UI at all. The Onestop has currently set up a workgroup with both WIA and EDD representatives to address this issue and they are developing solutions that they hope will solve this problem.

ISD and Service Volume

Figure 2 below shows the large growth of enrollment in WIA that occurred after the first year after implementation of ISD. In the year before ISD the entire local area had 3,348 new enrollees, after the first full year of ISD this number increased to 12,184 almost a 400% increase. Data from the first two quarters of fiscal year 2009-10 suggest that the enrollment was continuing to grow and would probably exceed enrollment for 2008-09. These data come from the state JTA records that are the official records transmitted from the local area to the state.

Figure VI-2: Alpha OneStop Number of Participants Enrolled and Exited in WIA 2007-08 to 2009-10

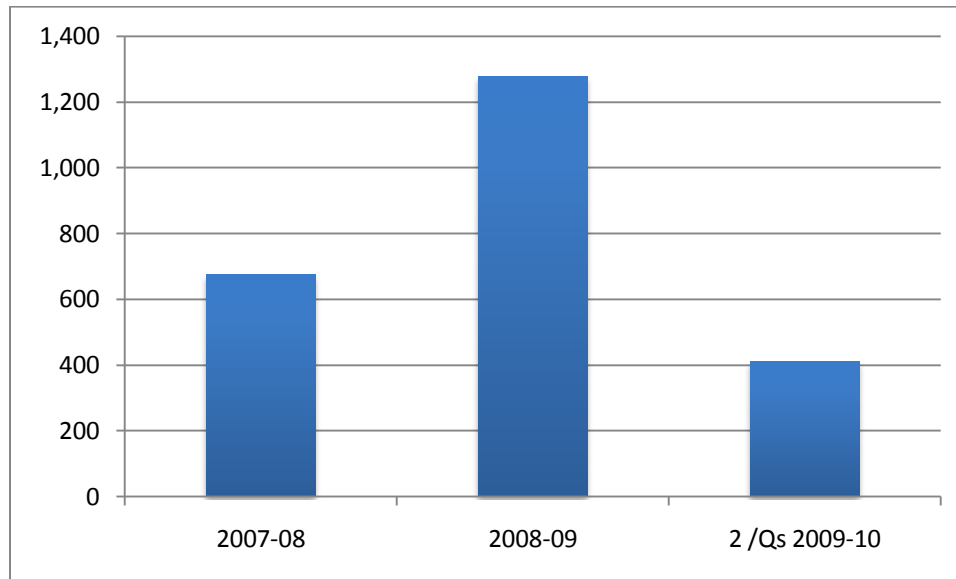


FY	2007-08	2008-09	2Qs 2009-10
Total	3,348	12,184	9,905
Carry in	1,093	1,420	5,647
New	2,255	10,764	4,258
Exiters	1,922	6,521	4,399

We compared this data with local data from the local data system and we could see clearly that pre-ISD the local areas served more than 3,000 customers, yet enrolled only slightly over 2,000 in JTA. The first year of ISD resulted in explosive growth in the number of enrolled customers in 2008-09 the first ISD year—an increase of almost 400%. The data for 2009-10 would seem to indicate that service volume was continuing to increase during the first two quarters of that year.

Next we looked to see what impact the increased focus on training had. As Figure VI-3 below indicates the number of customers enrolled in training increased significantly in the year following ISD implementation. In 2007-08, 675 customers received training services; by 2008-09 the number more than doubled to 1,277 in 2008-09 the first year of ISD. This increasing enrollment trend did not appear to persist through the first two quarters of the 2009-10 fiscal year with enrollments dropping to 410 for the first two quarters of 09-10; this amounts to a 35% drop on an annualized basis.

Figure VI-3: Alpha OneStop Number Enrollees in Training 2007-08 to 2009-2010



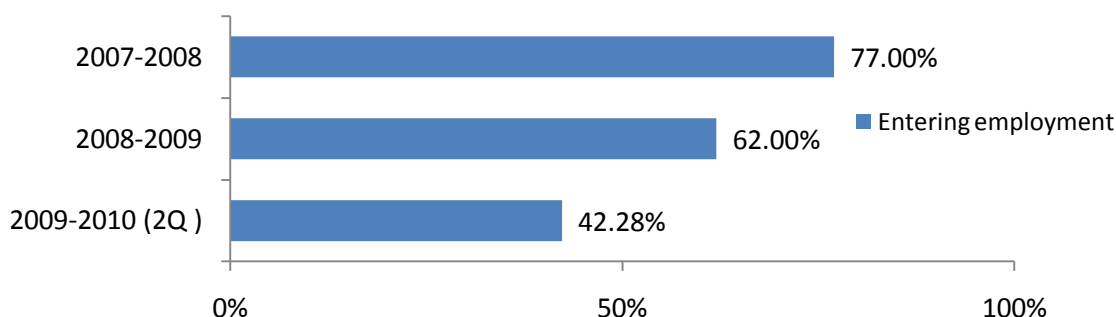
FY	2007-08	2008-09	2 /Qs 2009-10
Enrolled in Training	675	1,277	410

ISD and Performance

We were also interested in how the move to ISD would affect performance on the Federal performance measures. In a system where the goal is to enroll everyone there was bound to be an impact by ISD on performance. As the figures below indicate performance did decline on Federal performance measures for adult and dislocated workers.

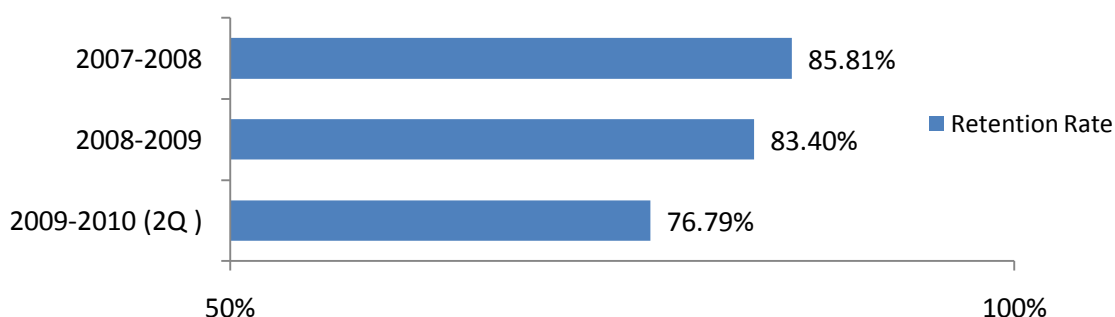
Figure VI-4 indicates that the entered employment rate fell slightly from 77% in the year before ISD to 62% in the first full year of ISD implementation and then dropped again to 42% for the first two quarters of 2009-10. This decline may not be attributable to ISD as the economy fell into recession at the same time. It is also important to note that there is substantial lag time in the calculation of federal measures. Because the measures focus on what happens to customers in the labor market after they leave the program and due to reporting lags in the unemployment insurance system which provides the data, data are for customers who exited the program as much as nine months earlier. The data from 2008-09 is largely for customers who were not served under the ISD model but were under the old model. Data for the first two quarters of 2009-10, however, should represent customers served by the new ISD Model.

Figure VI-4: Alpha OneStop Entered Employment Rate for Adult and Dislocated Workers 2007-08 to 2009-10



The retained employment measure (how many customers who left the program were still employed six months later) actually remained the same in the first year of ISD implementation and declined only slightly (from 83% to 77%) in the first two quarters of 2009-09 as shown in Figure 5. The first bar (2007-08) represents the pool of customers served in the year before ISD implementation. The following years (2008-09 and first 2 quarters of 09-10) with a same-sized pool of customers served by ISD, shows little decline in retained employment in spite of a deepening recession. This would seem to indicate relatively good success by the OneStop in placing customers into permanent, as opposed to temporary, jobs. This may also be a reflection of the nature of the jobs in which the ALPHA ONESTOP customers found employment. Since many (up to 50%) are professionals, employers are unlikely to go through the expense involved in hiring these individuals unless they are relatively confident of the ability to offer them long-term positions. Also, given the ongoing recession and scarcity of jobs, it is unlikely that these individuals would be willing to leave employment once they had found it.

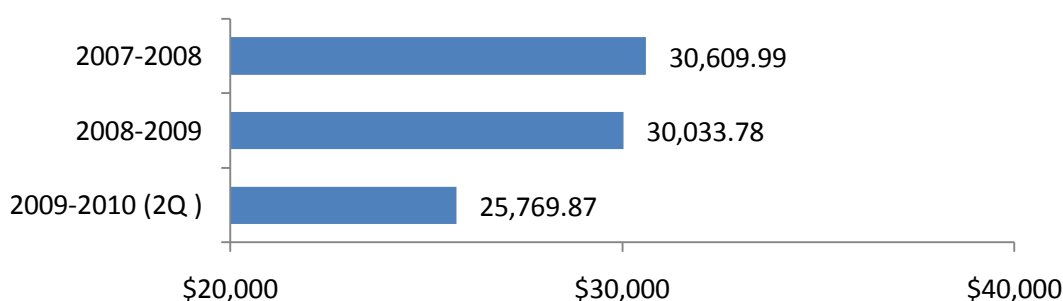
Figure VI-5: Alpha OneStop Retained in Employment for Adult and Dislocated Workers 2007-08 to 2009-10.



The earning measure shown in Figure VI-5 reports the earning of customers the first two full quarters after leaving the program. In 2008-09 the first year after ISD implementation, we see earnings drop slightly (-\$576), but this may largely reflect customers who were served during

the pre-ISD period and may be indicative of the beginning of the recession and its impact on salaries in the area. In first two quarters of 2009-10, the population of customers served under the ISD model shows another decline of \$4,264 in annual earnings. Again, the continuing recession probably plays a role in this fairly steep decline reflecting a tight job market and the increasing willingness of individuals to take positions with lower salaries.

Figure VI-6: Alpha OneStop Earnings Measure for Adult and Dislocated Workers 2007-08 to 2009-10



In our interviews Local Areas and OneStop managers were concerned about the impact of ISD on performance. While State officials promised to not punish local areas that adopted the ISD model for any decline in performance, in the long run it was not clear whether lowered performance on key measures, over time, would hurt them or not.

ALPHA ONESTOP Cost Analysis

The California Workforce Investment Board sponsored the development of a sophisticated Activity Based Costing system for OneStops. This system first identifies all the resources and costs that are “under the OneStop’s roof”. Then it traces those costs to the activities that generated those costs and ties those costs to the services produced creating cost/per service measures. These costs are then benchmarked against other OneStops in the system¹⁹. Here we present the benchmarked costs for this OneStop. Job Seeker and Business services costs are benchmarked separately.

Costs and Partner Contribution Cost Analysis

The analysis begins by looking at the costs of each partner under the OneStop’s roof. The table below shows that Alpha had only one partner under the roof that contributed to costs, EDD.

¹⁹ A complete description of this project can be found in the projects report: *California OneStop System cost Study Report* (2007) Sacramento, CA: California Workforce Investment Board, available at www.calwib.ca.gov.

Table VI-2: ALPHA ONESTOP Costs Per Activity Compared to Benchmarks 2008-09

Job Seeker Process

	Alpha Cost	Median	Low	High
WIA Job Seeker Costs	\$6,363,000	\$1,205,750	\$371,602	\$6,363,000
EDD Job Seeker (Partner) Costs	\$1,224,585	\$1,171,470	\$17,023	\$3,213,810
Partner Cost as % of Total ONESTOP costs	12.5%	33%	1.8%	31.5%
Job Seeker Total Cost	\$7,587,585	\$2,568,050	\$470,985.00	\$7,587,580
Percentage of OneStop Total Costs:	77.75%	86.66%	51.24%	100.00%

Business Services Process

	Alpha Cost	Median	Low	High
Business Services Total Cost	\$1,086,000	\$257,249	\$8,836.00	\$1,349,880
Percentage of OneStop Total Costs:	11.13%	7.72%	1.84%	43.66%

Youth Services Process

	Alpha Cost	Median	Low	High
Youth Services Total Cost	\$1,085,000	\$722,901	\$455,175.00	\$1,273,760
Percentage of OneStop Total Costs:	11.12%	22.43%	7.09%	44.19%
Total ONESTOP Cost	\$9,758,585	\$3,548,200	\$934,996	\$10,211,220

The cost analysis shows that the ALPHA ONESTOP had approximately \$9.76 million in costs in the 2008-09 program year, the first year of ISD implementation. This is about three times larger than the median sized OneStop in the benchmark group and almost as large as the largest. Seventy-eight percent of these costs were incurred serving job seekers, with 11% attributed to business services and 11% for Youth Services. This includes WIA costs and EDD costs; EDD is Alpha's only Partner and, as shown, EDD costs account for only 12.5% of total costs for the OneStop. This is significantly below the median EDD partner costs of 21% and reflects the relatively dominant role of WIA at this particular OneStop.

Table VI-3 displays a summary of costs per activity as a percent of funds used for Job Seeker Services along with comparisons with median percent costs for all OneStops. When we look at the activities that generated the costs we see the distribution of costs reflects the ISD goal of enrolling as many customers as possible as well as the kind of services most appropriate to their mix of customers that includes a high proportion of professionals with college educations. The five activities with the highest costs relative to the benchmark group were "Orientation to OneStop and Initial Assessment", "Self-Service-Job Search Information and Support", "Coaching for job search information and support", "Workshops: job search and support", and "Job Seeking Networks"²⁰. These five costs were substantially above the median for the benchmark group that includes a number of non-ISD OneStops.

²⁰ An important note on costs, since this system measures costs that occur under the OneStop roof, training which takes place off site, such as a client enrolled in a community college training program is excluded. So the cost of assessing and case managing a client with an ITA would be included and the actual cost of the ITA is excluded.

This suggests that the ALPHA ONESTOP adjusts to local conditions by focusing on those aspects that relate to assisting customers through services offered in group settings. Costs are lower, however, for IEPs, case management, support services and placement assistance. This appropriately reflects the needs of its client population that consists of approximately 50% professionals with an in-depth knowledge of their own career fields and potential employers.

Table VI-3: ALPHA ONESTOP Percent Costs Per Activity Compared to Benchmark Medians 2008-09

Job Seeker Services	ALPHA Percent of Total Cost	Median Percent of Costs
Orientation to OneStop and Initial Assessment	19.99%	6.97%
Self Service- Job Search Information and Support	12.90%	5.84%
Coaching: for job search information and support	13.04%	8.62%
Workshops: Job search and support	9.13%	6.88%
Job Seeking Networks	3.36%	1.49%
Individual Service Plan, such as IEP	1.30%	5.00%
Case management	7.52%	8.34%
ITA/ OJT	3.26%	4.35%
Training and Education	5.97%	3.39%
Support Services	0.65%	3.83%
Placement Assistance	0.63%	5.98%

After we developed costs for each activity we measured the number of service units produced for that activity and then calculated the cost per unit of activity produced. Table VI-4 shows this data for this OneStop with benchmarks²¹. Overall the Alpha OneStop had costs for the services it produced that were somewhat higher than the median and in two cases (“Cost per job seeker” and “Cost per client receiving support services”) were the highest in the benchmark group. The other costs, which relate to specific services, seem to be in line with those of the benchmarks. The overall cost per client indicates two things to us: first the average client at this OneStop is probably receiving more, or more intensive, services than in the benchmark group, reflecting the OneStop’s philosophy and approach, and the professional nature of their customers; second, some customers may receive services without being counted so that the average cost per client calculated is higher than it would be if they were all counted as they are at other benchmark OneStops.

²¹ Note all data is self-reported by OneStop. In some cases while the center reported costs for a particular activity, such as job seeking networks or job clubs, they did report the amount that service produced so no cost per unit of service could be produced.

Table VI-4: ALPHA ONESTOP Costs Per Unit of Job Seeker Services With Benchmarks 2008-09

Cost Per Unit of Service	OneStop Dollar Cost Per Unit	Median Cost Per Unit of Service	Low Cost Per Unit of Service	High Cost Per Unit of Service
Cost per individual Job Seekers served (Enrolled Client + Universal Clients. Unique individuals)	\$0.00	\$22	\$1.79	\$119
Cost Per Job Seeker	\$292	\$64	\$7	\$292
Cost Per Job Seeker Visit	\$16	\$10	\$0.60	\$67
Cost Per Job Seeker Service Event (e.g. faxed a resume, accessed career information on internet)	\$16	\$10	\$0.92	\$40
Cost per one-on-one coaching events	\$0.00	\$72	\$2.23	\$486
Cost Per Workshop	\$1,220	\$1,016	\$113	\$4,533
Cost Per Person attending	\$66	\$85	\$19	\$572
Cost per Job club or network member	\$1,093	\$709	\$65	\$5,222
Cost per person attending	\$1,093	\$579	\$44	\$1,431
Cost Per Job Seeker completing comprehensive assessments	\$0.00	\$189	\$14	\$1,124
Cost Per IEPs or other formal plans created	\$215	\$177	\$10	\$675
Cost per client getting case management	\$110	\$144	\$26	\$1,377
Cost per meeting with case manager	\$0.00	\$61	\$8.92	\$245,846
Cost per client session	\$0.00	\$1,080	\$14	\$13,110
Cost per client with ITA or OJT	\$539	\$850	\$134	\$2,288
Cost per client receiving training/education	\$350	\$373	\$18	\$1,770
Cost per hour of training/ education	\$21	\$79	\$21	\$8,337
Cost per client receiving support services	\$2,052	\$397	\$16	\$2,052
Cost per client placed (entered employment)	\$0.00	\$807	\$92	\$8,401

Lessons Learned

Finding a way to more efficiently deal with customer seeking help on Unemployment Insurance issue, may help ISD sites to operate more efficiently. Currently the combination of the EDD's online/telephone only approach to customer service creates an excessive burden on integrated service delivery OneStop locations. It also contributes to some conflict around integration, cross-training and workload management.

As was stated by one individual: "Integrating service delivery depends on integrating staff." Cultural and organizational differences between EDD and WIA staff create barriers to full integration of the two groups and their work within the ISD model. Some of the differences uncovered at this site that inhibit seamless integration include:

- Pay differentials—WIA staff at this site are generally paid up to 50% more than EDD staff (sometimes more).
- WIA staff, at least at the ALPHA site, are more highly educated, are more professionally oriented and tend to have specialized functional expertise and experience. EDD staff are generally less well-educated, responsible for generalist functions and do not have the same professional experience and areas of in-depth expertise.
- EDD culture is more compliance driven while WIA staff are more focused on performance outcomes and client satisfaction—these reflect both the nature of their respective missions and their organizational control systems.
- EDD staff is relatively small compared with the ALPHA ONESTOP (8 vs. 40+) and the imbalance makes integration more difficult.

The specific design of the ISD system must reflect the kinds of individuals served. What works for highly educated professionals may not work for blue-collar workers and vice versa. What creates a welcoming environment for one group may be intimidating or unappealing to another.

History is an important determining factor on organization structure and systems. Early design and philosophy can be difficult to change or, if it is conducive to the desired changes, can be a powerful catalyst.

And finally, management and leadership make a difference. Effective leaders with a clear vision and strong sense of mission can make a significant positive difference in achieving change and performance goals.

VII Integrated Service Delivery Data and Systems

Integrated Service Delivery and Data Systems

Introduction

The creation of Learning Labs immediately challenged the utility of existing data systems. Planning documents show that in the planning phase managers realized that real service integration would require a data system that could be shared by both WIA and Wagner-Peyser program. Further both programs would have to have shared responsibility for federally mandated outcomes and thus have a shared system for tracking these outcomes. A goal of the formative evaluation was to review existing data systems and determine what data were available for the second “summative” phase of the evaluation where we will measure the impact of ISD.

It is presumptuous for an outsider to describe the data systems used as part of Integrated Services Delivery (ISD) to the people who use these systems on a daily basis. Our hope here is that by talking to people using these services at all levels we may gain some insight that is often missed by those whose jobs force them to focus on a particular portion of the greater activity. As the real experts read this document, we encourage them to let us know where we have errors in the details.

Collecting the data used to analyze the effect of the introduction of ISD in California has been a complex task. This complexity arises from the many different purposes that the separate data systems are used for by different portions of the job services system in the state. Some data is used primarily to provide state level reports and to forward information to national level agencies. Much of this information is difficult to disaggregate to the level of the OneStop. Other information is accumulated to give a current snapshot of the system, but historical descriptions of the state are nearly impossible to obtain. Basic information on the number of clients served is often lost because there are many definitions of who the clients are. Many people served informally at the local level appear idiosyncratically in local databases, but are missing in more aggregated summaries. This last observation is potentially very serious as ISD seems to have increased participation when looking at the types of clients reported to the state, but may have decreased services provided informally by the local offices.

This report attempts to describe the types of data available, and some of the many limits in using these often-inconsistent data systems. We divide the many sources of information into three types for this report: Statewide data designed by the pre-ISD Workforce investment Act housed in the JTA database; Statewide data designed for the pre-ISD Wagner-Peyser Act housed in the Caljobs system; and a group of local databases used by OneStop managers that include VOS and CISRS.

The Big Picture: Three Primary Types of Database

State Level Workforce Investment Act Data: Job Training Automation System (JTA)

For information on services that are provided for the Workforce Investment Act (WIA) the best systematic summary is provided by JTA. Information in JTA may be summarized at the statewide level and the Local Workforce Investment Act offices (LWIA). Disaggregating below the LWIA level is nearly impossible from state level JTA databases, but one can get often get

that information from databases that the local offices use to manage their operations such as CISRS and VOS. Disaggregation of JTA data to the OneStop level is possible at the local level if the local area has entered codes for different OneStops but none of our four case study sites used this capacity. Disaggregation is important in our analysis of the effects of ISD because in the larger LWIA's some OneStops will be using ISD, while others are not. This makes accurately isolating the effects of ISD problematic.

Initial inspection of the data dictionary for JTA²² is very promising for our purposes as the data has fields for much information not included in the standard reports. For example, JTA offers a field to keep track of "Universal Access Clients" which are people who are not formally "enrolled" in the systems used to keep track of clients. Unfortunately, very few Universal Access Clients have any information in JTA, so what information there is available on these people must be obtained from LWIA or OneStop sources.

Of course, since JTA was designed to keep track of WIA clients it won't list Wagner-Peyser clients in non-ISD sites. Some ISD sites have made a systematic attempt to include these clients. As a result, some of the increase in enrolled/registered clients in JTA when comparing pre and post integration data will be due to this cross listing of Wagner-Peyser and WIA clients.

State Level Wagner Peyser Data: Caljobs

The CalJOBS database is used both by clients, and by Wagner-Peyser staff. Clients find a broad listing of jobs available in CalJOBS. Many universal access clients will be people who stop by the OneStop to access CalJOBS, or do something similar from their own computer at home. There are so many remote clients that they tend to swamp out all other effects. For example, at our case study site Transport City in 2008-2009, 97.8% of newly enrolled participants in CalJOBS were remotes, people who may have never entered the center but who are still considered clients of the center.

Perhaps the largest problem created by the existence of remote users, is that clients who get a job often continue to access CalJOBS afterwards. As a consequence, there may be very few "exits" from the program even for clients with successful placement. The reasons for this are not difficult to identify. Often clients will get a job, but not one they wish to stay in and they keep logging in to CalJOBS to look for something better. Unfortunately, this can mean that ISD sites show fewer exits than their non-ISD counterparts as clients who are both WIA and EDD clients will not be exited if they continue to use CalJOBS.

Our primary focus is less on the client use of CalJOBS than on the staff use. EDD staff in the Sacramento office use CalJOBS to produce reports that are required by the federal government. Many integrated offices don't use CalJOBS for client management, choosing instead to install their own local data systems (VOS or CISRS) and export data to CalJOBS for periodic reports to the state. At the OneStop level we found in our four cases staff know very little about retrieving information from CalJOBS. While it is used as a management tool in EDD regional offices we saw very little use of it in the local OneStops.

²² "Workforce Investment Act Job Training Automation System Client Forms Handbook" produced by Workforce Services Division February 2010.

This matters significantly when attempting to analyze the effect of ISD. Disaggregating CalJOBS data to the OneStop level is very difficult. Each local office has a 5 digit identifier called an “attendance reporting unit” or ARU. The first two digits of this number specify the region, and the last three the local office. At the statewide level they have a complete list of ARU’s, but they don’t know the meanings of the codes. That is, they can’t tell which ARU is a particular OneStop that is using ISD and which one is another OneStop that is not. Also a single ARU may include more than one local OneStop or maybe a combination of several EDD locations. Local OneStop managers don’t often use CalJOBS, so they mostly don’t know the ARU’s either. Regional managers have staff members that know the ARU codes, and these staff must be tracked down to do the disaggregation.

Once the ARU’s are obtained, CalJOBS can give a fair snap-shot of the current situation in a particular location. Unfortunately, the database does not preserve history. If nobody has printed out a report and kept hold of it, then CalJOBS cannot describe the situation that prevailed more than a year or two in the past. Hence, there is no data in CalJOBS on the year prior to ISD for most locations.

Further at some case study sites, they attempt to enter all clients into both CalJOBS and JTA, but in practice neither system is comprehensive, some people entered into JTA are not in CalJOBS and some people in CalJOBS are not in JTA, so it is impossible to create a complete unduplicated count of clients served at a particular ISD site from these databases.

Local Databases: VOS and CISRS

For the most part JTA and CalJobs are viewed by managers in the local OneStops as useful tools at the statewide level, but not something that is useful for day to day management. Local goals often differ from statewide goals, especially in the WIA side of things. Members of the Local Workforce Investment Board (LWIB) often include local government representatives, private partners of the OneStop, and prominent business leaders. There may be pressure from the LWIB to “keep high tech workers in town” or something similar, while statewide concerns may be quite different, such as a focus on the poorest job seekers. While all of these goals are laudable, they do place emphasis on different statistics to keep track of what is happening. Consequently, local administrators tend to set up their own measures of success that are not only different from the statewide measures, but different in different OneStops.

Trying to wrangle some consistency between the local databases and the statewide databases can be challenging. In most locations we saw evidence that implementing ISD increased participation among enrolled/registered clients (the JTA number) but often decreased participation by various measures of universal access clients or total clients served.²³ In other locations we found inconsistencies between the local enrolled/registered client count and the totals found in JTA for the same period.²⁴

²³ See table xxx describing the situation in RV Rural, for example.

²⁴ In the Big City LWIA for our case study we saw the numbers reported in JTA that were lower than the numbers for the same categories from CISRS in the same time period. Presumably this means that something that is part of the LWIA data at the state level was not provided to us. We’re still trying to track down this problem.

The VOS system is used by several OneStops around the state and in two of our case study sites, but the system is not equivalent in different locations. VOS has several modules, and not every location buys all of them. This can cause complications for local administrators when attempting ISD. For example, some local WIA managers didn't purchase the Veterans VOS module prior to ISD. After ISD they may wish to get everyone in the office using the same system, but an EDD manager must export data on Veterans to CalJOBS. Since the WIA manager is likely to have to pay for the module, what happens next largely depends on the level of trust and commitment to ISD between the two managers. In some offices the new module will be bought and ISD will have improved efficiency by reducing the amount of redundant client information that is entered for clients in both WIA and EDD programs. In other offices, there may actually be an increase in redundant data as both bosses require all clients entered in both EDD and WIA systems. In one of our case study sites, the manager reported that every employee spent half a day a week entering data. This suggests that these costs can be high.

For the particular years investigated in this study, the date of implementation of the local system caused difficulties. At CVRural the first year of VOS was also the first year of ISD. In the JTA numbers this makes the "new participants" number junk as everybody in the was added to VOS that year as a new client. In the 2007-2008 fiscal year there were 280 new participants, which rises to 3,010 in 2008-2009 (the first year of ISD and VOS). In the first half of the 2009-2010 data, this number was 880.

Structural Issue: What is and is not integrated in ISD

We made some attempt to find out what numbers various managers in the system thought were most important: the numbers that they managed to. Some numbers, especially those critical to the LWIB's that the LWIA managers answer to were likely to be stored in local databases. Other numbers that were important at the statewide level were those that appeared in CalJOBS and JTA state-level databases. The local managers kept track of these numbers in the local systems, but eventually they were uploaded to the statewide systems.

Figure VII-1 shows a rough picture of the organizational chart of Wagner-Peyser and WIA offices prior to Integrated Services Delivery, while Figure VII-2 shows roughly the structure after ISD. Note that while ISD did integrate offices at the statewide and local levels, it did not integrate at the regional levels or integrate data systems. Most local offices have EDD managers and WIA managers with different priorities. The numbers they manage to differ as well. This probably has significant implications for what changes were, and were not made during ISD. As has been mentioned above, ISD seems to have increased participation of "enrolled/registered" clients, but possibly reduced participation of "universal access clients." Since universal access client statistics are invisible to statewide level administrators, this is a natural outcome of the system.

The Next Step: Matched Pairs

The next phase of this study of ISD involves selecting 12 sites that went through ISD with 12 very similar sites that did not go through ISD. Selecting these sites requires looking for locations with similar characteristics prior to integration. CalJOBS can't produce reports in the pre ISD period and tracking down ARU's is difficult, so it not much help in this task. JTA will

be the main source of data for the comparison. This is not ideal because JTA can't be disaggregated to the OneStop level, and it contains only information about WIA activities. However, once the 12 matched pair sites are identified, we can track down the ARU's and get some CalJOBS information. The local data systems may also be helpful if measures of some critical statistics are similar enough across the systems.

Figure VII-1: Rough Pre-ISD Structure

Rough Pre-ISD Structure

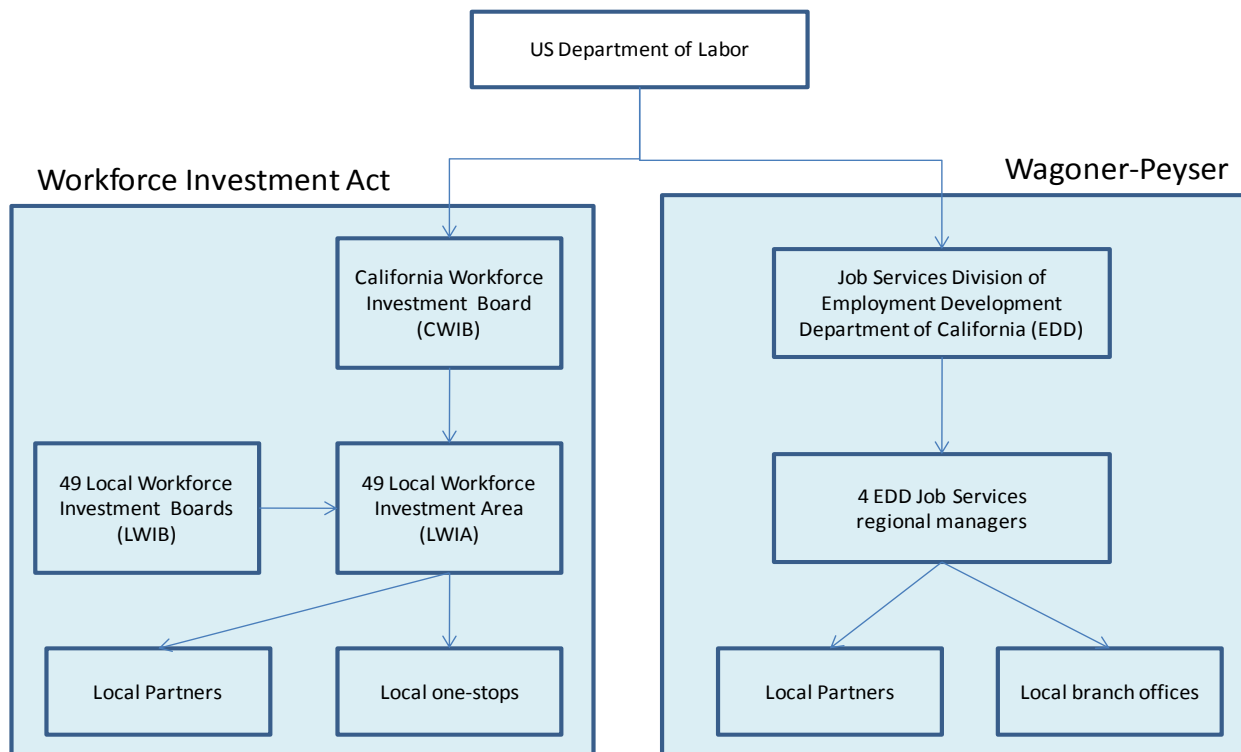


Figure VII-2: Rough Post-ISD Structure

Rough Post-ISD Structure

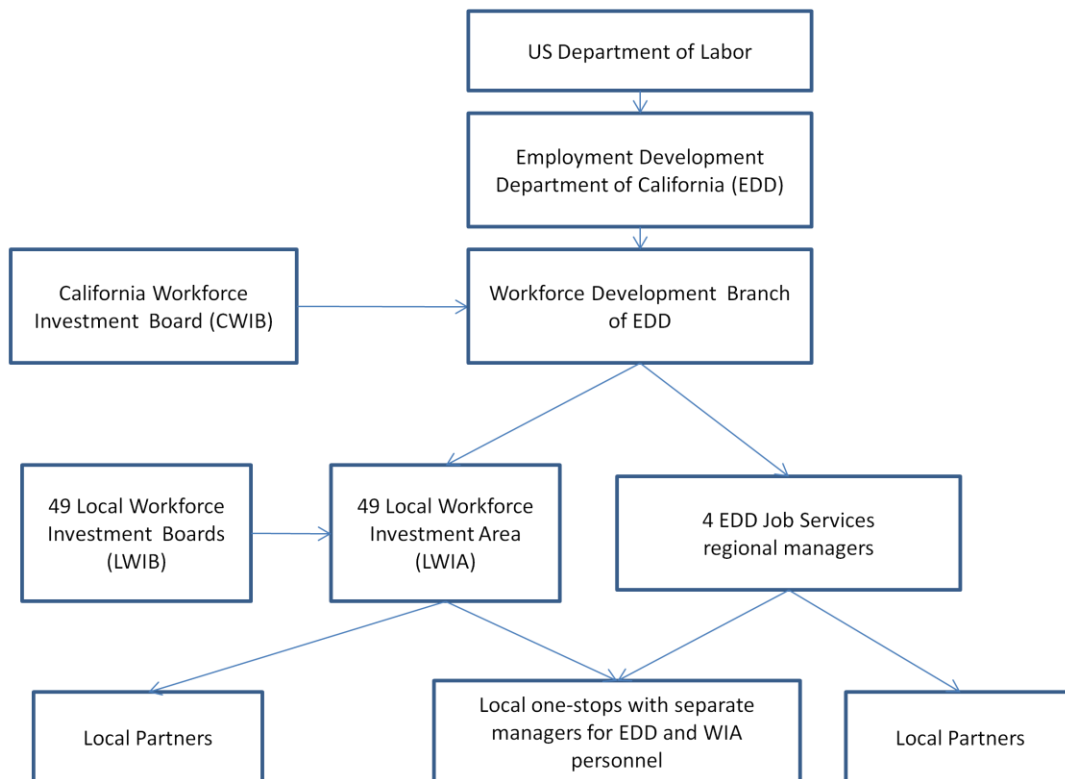


Figure VII-3: Database

Database Name	Purpose of System	Lowest Level of Aggregation	Frequent Users	Infrequent Users	Other Issues
JTA	*Keep track of WIA information.	LWIA	*WIA staff at the state level	*WIA staff at the local level	* No measure of Universal Access Clients * Can't disaggregate to the OneStop level * Wagner-Peyser information not included in a consistent fashion.
CalJOBS	* Job database for client use; * Keeps track of Wagner-Peyser staff activities	ARU	* Clients *Some regional EDD managers	*Local EDD managers in ISD locations	* At the state level ARU are listed, but which ARU is associate with which OneStop is not known. * Most local managers don't know their ARU's * Regional EDD managers that use CalJOBS regularly may know ARU's * Can't get historical snap shots * Clients checking CalJOBS after placement never exit the program
CISRS	* Local data system used at some OneStops to keep track of activities.	Lower than we need to go for this project	* OneStops in some locations	*State level staff	* Data for JTA is usually produced periodically in a batch. Staff locally know CISRS, but very little about JTA * Data not designed to be fed into JTA is typically defined locally and may not be comparable to slightly different measures used in VOS locations.
VOS	* Local data system used at some OneStops to keep track of activities.	Lower than we need to go for this project	* OneStops in some locations	*State level staff	* Data for JTA is usually produced periodically in a batch. Staff locally know VOS, but very little about JTA *VOS consist of modules and different OneStops have some, but not all modules. * Data not designed to be fed into JTA is typically defined locally and may not be comparable to slightly different measures used in other VOS or CISRS locations.

Figure VII-4: JTA vs VOS at RC Rural

Client Services at RV Rural: JTA vs VOS						
Report Range Start	7/1/2007	7/1/2008	7/1/2009	Comment on Period if not matching Column Heading	Source	
Report Range End	6/30/2008	6/30/2009	12/31/2009			
Broad Activity Measures						
Individuals that Registered	16,586	3,966	3,611	The partial 09-10 report runs from 7/1/2009 to 5/19/10	VOSS	
Individuals that logged in	13,624	4,858	5,681	The partial 09-10 report runs from 7/1/2009 to 5/19/10	VOSS	
Total Number of distinct individuals receiving services	8,895	7,671	7,356	The partial 09-10 report runs from 7/1/2009 to 5/19/10	VOSS	
Total number of Distinct Individuals Enrolled in WIA	279	2,570	1,521	The partial 09-10 report runs from 7/1/2009 to 5/19/10	VOSS	
Total number of Services Provided to Individuals	72,302	56,029	48,588	The partial 09-10 report runs from 7/1/2009 to 5/19/10	VOSS	
Total Participants (carried in + entering)	649	3,206	1,896	Not applicable	JTA	
Total number of Wagner Peyser participations	248	5,948	4,535	The partial 09-10 report runs from 7/1/2009 to 5/19/10	VOSS	
Total number of Completed WIA applications	535	2,824	1,350	The partial 09-10 report runs from 7/1/2009 to 5/19/10	VOSS	
Total number of WIA Participations	221	2,649	1,141	The partial 09-10 report runs from 7/1/2009 to 5/19/10	VOSS	
Total number of generic program applications created	8	1,947	102	The partial 09-10 report runs from 7/1/2009 to 5/19/10	VOSS	
total number of generic program activities created	4	1,177	99	The partial 09-10 report runs from 7/1/2009 to 5/19/10	VOSS	
Total number of TAA applications created	0	3	0	The partial 09-10 report runs from 7/1/2009 to 5/19/10	VOSS	
Total number of Partially Completed TAA applications	0	0	0	The partial 09-10 report runs from 7/1/2009 to 5/19/10	VOSS	
Total number of TAA Participations Created	0	0	0	The partial 09-10 report runs from 7/1/2009 to 5/19/10	VOSS	
Total number of TAA Activities Created	0	0	0	The partial 09-10 report runs from 7/1/2009 to 5/19/10	VOSS	
Participants Carried In						
Participants Carried In	369	196	1,016	Not applicable	JTA	
New Participants						
New Participants Entering Grant	280	3,010	880	Not applicable	JTA	
Exits						
Total Participants Exiting WIA	453	2,190	700	Not applicable	JTA	
Total number of Wagner Peyser exits	0	0	0	The partial 09-10 report runs from 7/1/2009 to 5/19/10	VOSS	
Total number of WIA exits	442	2,291	810	The partial 09-10 report runs from 7/1/2009 to 5/19/10	VOSS	
Total number of Generic Program Exits Created	0	2	0	The partial 09-10 report runs from 7/1/2009 to 5/19/10	VOSS	
Total number of TAA Exits Created	0	0	0	The partial 09-10 report runs from 7/1/2009 to 5/19/10	VOSS	
Total number of Staff Assisted Referrals to Providers	0	0	0	The partial 09-10 report runs from 7/1/2009 to 5/19/10	VOSS	
Total number of partial Wagner Peyser applications	0	0	0	The partial 09-10 report runs from 7/1/2009 to 5/19/10	VOSS	

VIII Lessons Learned

An Assessment of Critical Success Factors In ISD Implementation: Lessons Learned

Overview

In this formative phase of the evaluation we studied four OneStops in some depth. This allows us to examine their experience in detail, but it does not provide a large enough sample to generalize to the entire population of ISD sites. It does allow us to identify factors that emerged across the four sites that seem to either support or hinder the implementation of ISD. Based on this analysis we have identified a series of “critical success factors” that appear to us to influence the success of ISD implementation and give us some evidence to suggest strategies that help other OneStops implement ISD.

Critical Success Factors

Integrated Service Delivery (ISD) is a strategy to change the way that services are delivered to customers of both the California Employment Development Department (EDD) Wagner-Peyser Programs and local Workforce Investment Boards (WIB) programs within California OneStops. It is intended to minimize duplication of effort and maximize service quality and convenience for customers of both agencies. The key to achieving the goals of ISD, which we detailed in the introduction, is effective implementation of the integration process in individual OneStops. In this study of the ISD implementation in four learning labs, a number of implementation issues emerged. These issues, in turn, reveal a set of critical success factors for ISD implementation that, in our view, can affect the degree to which the integration process succeeds.

The critical success factors (CSFs) we identified fall into two categories; the OneStop’s context and the implementation process.

Context

- Organizational Culture and Political Context
- Local and Regional Context

Implementation and Process

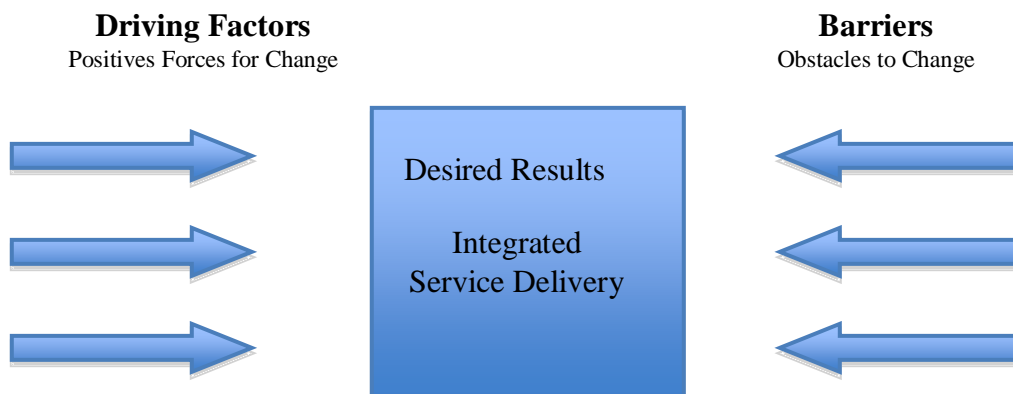
- Management Structure
- Decision-making Processes
- Formal and Informal Implementation Strategies

Each critical factor can be viewed as either a *driving* factor—one that promotes the desired change—or a *barrier*—one that inhibits the desired change. This model of change or strategy implementation was first proposed by Kurt Lewin²⁵ to provide a way of conceptualizing the critical factors affecting change management in organizational settings. The following

²⁵ Lewin K. (1943). Defining the "Field at a Given Time." *Psychological Review*. 50: 292-310. Republished in *Resolving Social Conflicts & Field Theory in Social Science*, Washington, D.C.: American Psychological Association, 1997.

diagram summarizes the impact of the interaction of these forces on strategy implementation and organizational change.

Figure VIII-1: Lewin's Driving Factors and Barriers



The key to effective change is to design strategies and processes that enhance and support the driving factors and diminish or remove the barriers to change.

CONTEXTUAL FACTORS

In examining contextual factors we identified two general categories of context: the organizational and political context, and the local and regional context.

Organizational Culture and Political Context

Local EDD units and WIA organizations have very different organizational cultures reflecting the values of their respective parent organizations and/or their individual staff members. EDD units are part of a large state-wide bureaucracy with a clearly defined mission, legislatively mandated rules and regulations and a focus on compliance. Employees of EDD may move around the state from unit to unit, and promotions come from advancing within the larger EDD hierarchy. WIAs employees are less organizationally focused and generally have a more professionally oriented set of values and goals. As a program designed to have local control, WIA programs are governed by a local WIB; WIA programs have more flexibility in defining and achieving local goals. Local WIA areas have organization structures and processes tailored to the unique needs of their regional clients and employers. For example some of the OneStops studied were operated by independent nonprofit organizations others by local government employees. There is not a uniform state-wide WIA model or organizational culture, but there is a state-wide EDD organizational culture.

While both organizations must respond to federal performance measures, all EDD units must also meet management standards defined by the State of California. Lastly WIA organizations often have data systems that are incompatible with CalJobs and use measures different from their co-located partners to monitor operations and measure performance. These

differences lead to problems in measurement, reporting and management control; it also sometimes results in conflicting priorities.

In summary the drivers of, and barriers to, integration resulting from organizational culture and political factors can be summarized as follows:

<u>Drivers</u>	<u>Barriers</u>
<ul style="list-style-type: none"> • Shared mission and vision • Common goals and measures • Common values and priorities • Shared commitment to customers • Compatible data systems 	<ul style="list-style-type: none"> • Different sense of mission and purpose • EDD and WIA held accountable to different goals and measures • Different data system

Local and Regional Context

The local setting and its history appeared to be one of the factors that influenced the implementation of ISD. When the WIA and EDD organizations had a history of cooperation and mutual support, implementation proceeded more quickly and more smoothly probably reflecting a higher level of trust and experience cooperating and sharing responsibilities. The Transport City Case is a good example of the power affect of a positive history of cooperation has on ISD. Often this history is a reflection of the personal management philosophies of the senior managers and strength or weakness of their personal relationships before instituting ISD. Common goals will not overcome lack of trust but high trust can overcome differences in goals and conflicting priorities. This finding also raises the question of how ISD sites that are successfully integrated will survive management changes. If much of the ISD success hangs on the good relationship of EDD and WIA managers, and one leaves will that threaten the long-term viability of ISD?

A second major local factor was the symmetry (or asymmetry) between the two organizations—WIA and EDD. The symmetry, or lack of symmetry relates to size, in terms of staff and budget, the experience and education of staff, the pay differentials between WIA and EDD staff. We saw clearly in the Alpha Case and CVRural case that the fact that EDD employees were far outnumbered by local WIA employees made integration of the entire OneStop problematic.

Another important factor was the presence or absence of full-time EDD management on site. In some cases, such as Big City OneStop, the EDD organization had equivalent level management on site; in other cases EDD management was more regional and only spent a limited number of hours per week on site. When this was the case it was hard to quickly and authoritatively resolve conflicts and problems that emerged in the ISD implementation, sometimes undermining the effort.

Finally, the arrangement of the work space can have a significant impact on the long-term cooperation and ultimately, integration of the two organizations. Shared space and close

proximity will generally lead to better relations and identification with common goals; physically separated spaces will generally lead to less cooperation and integration.

Generally, greater symmetry among these factors increased the probability of effective integration; asymmetries reduced that probability. While size differences may not always be important in joint activities, it can be critical in joint decision-making, especially when the decisions are about establishing common goals and budget priorities. Over time the old adage that “those who have the gold make the rule” is generally true and reflects the relative power resulting from staff and budget asymmetries. Size can also affect the perception of whether the integration process is taking between equals or represents the assimilation of one organization by the other.

In summary the drivers of, and barriers to, integration resulting from local contextual factors can be summarized as follows:

<u>Drivers</u>	<u>Barriers</u>
<ul style="list-style-type: none">• History of cooperation• Good working relationship between EDD and WIA management• Full-time EDD senior manager on site• High level of trust between WIA and EDD staff• Shared management philosophy of senior management• Symmetry in size and budget• Common shared space	<ul style="list-style-type: none">• History of conflict between EDD and WIA organizations• Poor relationship between EDD and WIA management (or no relationship)• Senior EDD manager on site part time only• Competitive rather than cooperative management philosophies• Significant asymmetry in budget or personnel• Physical barriers in the work space

Implementation and Process Factors

Management Structure

Several aspects of the OneStops’ management structure and managerial processes emerged as critical factors affecting ISD implementation. The first was the formal strategic planning process. Those sites that used strategic planning, especially those where management and staff took the process seriously, were more successful in achieving the general goals of ISD. In particular, where the strategic planning process provided staff with a clear vision and a process for establishing measurable goals to achieve that vision, implementation was facilitated.

A second important management factor was the establishment of effective functional management. Because ISD requires sharing of responsibilities between WIA and EDD staffs, effective management of key functions across both organizations is essential. This requires the establishment of a virtual matrix organization with functions performed by members of both

staffs under the supervision of managers that may be from a different organization. For such a system to work there must be high trust among both management and staff since many individuals will find themselves reporting to two, or sometimes more, supervisors. To be effective such a system also requires effective communication and collaborative skills by all those involved, staff and management.

Finally, to achieve high performance an effective management structure must have an accurate and reliable data management system. All the learning lab sites were characterized by incompatibilities between WIA and EDD data systems, making sharing of information and evaluation of performance difficult at best, and in some cases, impossible.

In summary the drivers of, and barriers to, integration resulting from issues related to management structure can be summarized as follows:

<u>Drivers</u>	<u>Barriers</u>
<ul style="list-style-type: none"> • An ongoing strategic planning process • A clear well articulated vision • Shared goals by all staff • Effective functional management • Shared management responsibility • Compatible data systems 	<ul style="list-style-type: none"> • Lack of strategic planning • Poorly defined, or no vision • Conflicting goals or no goals • Conflicting management priorities • Incompatible data systems

Decision-making Processes

A key aspect of any change process is eliciting commitment from those that will have to make the change. Learning lab sites varied significantly in the degree to which they involved both WIA and EDD staff in the decision to implement ISD. In some cases the decision to become a learning lab was made top down by senior management; in other cases it was made with high involvement from staff personnel. Higher involvement generally led to higher commitment. Similarly in some cases the decision to become an ISD site was made collaboratively between the EDD and WIA partners, in other cases the WIA partner volunteered and the EDD partner was told to cooperate.

The degree of consultation and collaboration was generally higher within the WIA organizations as compared to local EDD offices. WIA staff in these cases could therefore be seen more as *volunteers*. In contrast, EDD staff more often was *volunteered*—that is they were not involved in making the decision but rather were just told they would be implementing ISD.

Particularly when committing significant resources to a new strategy, it is critical to clearly articulate the goals of the change process and the measures with which progress toward, and achievement of these goals will be verified. Generally these are defined in terms of what has been called SMART goals—specific, measurable, agreed-upon, realistic, and time-bound. Such clearly defined results allow organizations to clarify what is expected, motivate organizational members, and provide feedback on both progress and ultimate success. In the majority of cases

we examined no such goals were defined, or if they were those goals were neither specific nor measurable. Lack of specific goals makes managerial control—application of resources to critical functions and evaluation of performance difficult, at best.

A third critical success factor in this area was the degree to which any collaborative decision-making between local WIA and EDD staff persisted after initial implementation of ISD. Because of the challenges of effective adoption of ISD and the impact of unexpected problems, including the severe recession that occurred during the implementation process, collaboration and joint problem solving appears to have been an important contributing factor in achieving success in ISD implementation.

In summary the drivers of, and barriers to, integration resulting from the local decision making processes can be summarized as follows:

<u>Drivers</u>	<u>Barriers</u>
<ul style="list-style-type: none">• WIA and EDD staff involvement in decision to adopt ISD• Collaborative decision making between WIA and EDD staff and management in the initial design• Clear goals and measures (SMART goals)• Ongoing collaboration and participation by all staff beyond initial implementation• Joint problem solving	<ul style="list-style-type: none">• Failure to involve all EDD and WIA staff in the decision to adopt ISD• Poor communication and collaboration between EDD and WIA staff during and after implementation• Vague general goals such as “increase enrollments” without specific measures of success• Failure to see problems as being “shared problems” requiring joint problem solving by both partners

Formal and Informal Implementation Strategies

Organizational change seldom happens without significant effort. Individuals, teams and organizations have a natural resistance to any change even when it is seen as providing clear benefits. For change to succeed, it is necessary to directly address the causes of resistance and to overcome it through a process that involves the people who will be expected to change. Sites that developed strategies to manage this change process were more successful than those that did not.

One effective formal strategy we observed was to do team building with WIA and EDD staff prior to implementation. This allowed the staff members to raise issues, build trust and design strategies for effective implementation before problems, resistance and conflict occurred. A second approach used at one of the sites was to collect data after initial implementation to assess and evaluate customer satisfaction with the new process. This type of feedback helps staff see what has been accomplished and what remains to be done. Both of these approaches recognized that integrating services was a long-term process requiring continual evaluation, improvement and reinforcement.

Along with the above formal strategies used to facilitate integration, sites also applied some informal strategies that proved helpful in implementation. Several of the sites altered the physical layout of the OneStop to increase the interaction and communication between WIA and EDD staff. Besides being “under one roof” it is sometimes useful to put groups that must work closely together, and coordinate their efforts, close together physically. Sites that did not alter the physical arrangement to increase contact between the two staffs found it more difficult to build the trust communication and cooperation to build true integration.

Building a single brand for the OneStop also sends a powerful message to staff about integration. Integration seemed more successful at sites where EDD and WIA employees both wore the same badges and had the same logos on their business cards. Similarly at sites where integration seemed more successful, EDD and WIA employees share titles such as “skill specialist”, or “welcome team member”, to show they were on one team doing the same job regardless of who their formal employer was.

A final critical factor seems to be the importance of building social interactions between staff that have to work together under the ISD model. As illustrated in one of the case studies, after some initial social interaction around a monthly potluck, because emergent conflicts were not effectively dealt with, the initial social interactions and relationships eroded and communications and collaboration declined.

What each of these examples suggests is that the integration of WIA and EDD staff requires the careful attention to managing, supporting and reinforcing the changes required by ISD and recognition that these are two fundamentally different organizations with different cultures, management styles and organizational priorities.

In summary the drivers of, and barriers to, integration resulting from implementation strategies can be summarized as follows:

Drivers

- Team building prior to implementation
- Ongoing data collection on measures of effectiveness
- Physical integration of the Onestop layout
- Symbolic integration through titles and logos.
- Providing opportunities for social interaction among staff and management

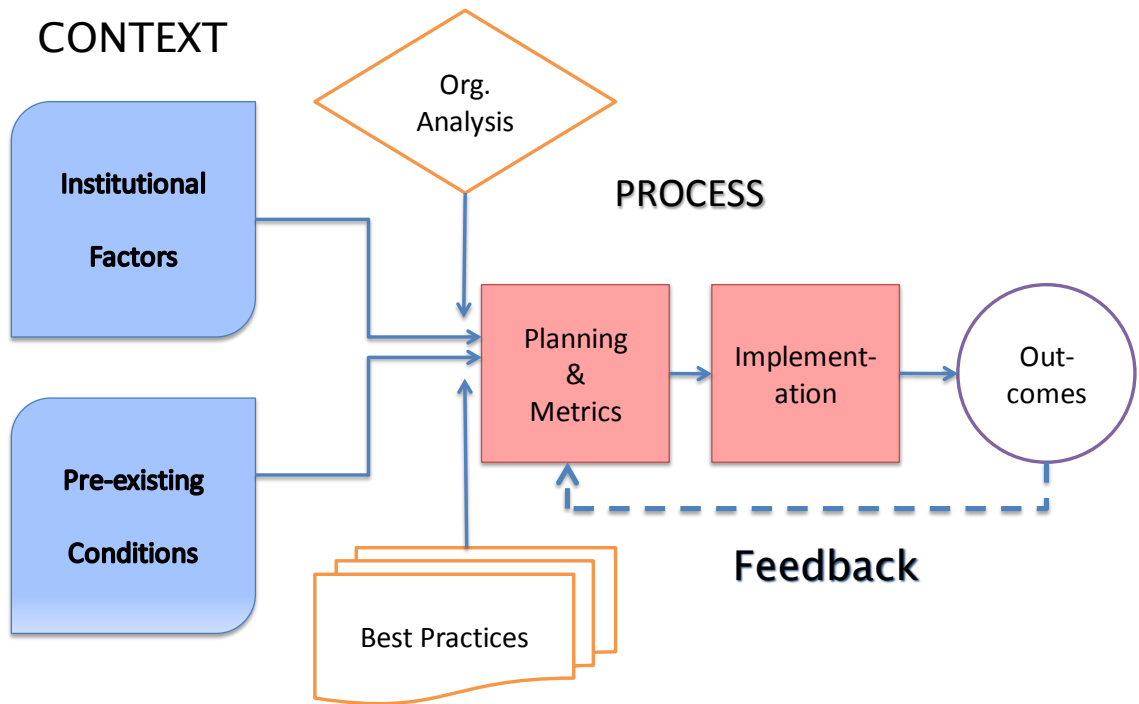
Barriers

- Failure to prepare staff for the implementation of ISD
- Lack of data feedback on results from the integration process
- Not reinforcing the change process after implementation
- Lack of social interaction between EDD and WIA staff

Seeing ISD as A System

Looking back overall our four case studies we see that ISD implementation is a system. The graphic below shows how all the elements discussed fit together into a systems view of ISD. Going from left to right you can see that the context comes first. A local area can begin the ISD process by analyzing its local context based on the specific factors mentioned above. Next, the local area can review best practices from more established ISD sites. With this analysis complete the local area can engage in planning and set specific measurable goals related to their local context. The next step is the big one, the implementation of ISD. Again, our previous analysis suggests a number of factors that support and constrain a successful implementation. After implementation progress needs to be measured against the goals, and the results fed back into the system to make the needed adjustments.

Figure VIII-2: ISD A Systems View



Final Thoughts

Management guru Peter Senge says that “Profound Change” is an organizational change that combines “inner shifts in people’s values, aspirations and behaviors with outer shifts in processes, strategies, practices and systems.” We see ISD as a profound change for the workforce system. Both EDD and WIA staff and managers have to change how they see themselves, their jobs, their organizations and their clients in order to change the systems, practices and strategies that make up workforce programs. This is a huge challenge in normal times, and an even larger one in the chaotic context created by the recession and stimulus funding. We were impressed throughout our field work by the commitment and dedication of the people working in the OneStops we studied. We hope that this analysis of the four case study sites will contribute to the continued improvement of the California workforce system.

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X Appendix

ISD Case Study Protocol

I Pre-visit:

Develop Pre-visit Profile:

- Read Annual Plan and local context
- ISD application, goals
- ID key staff and do recon phone interview

II Initial Visit

- Upon arrival ask for a brief tour to get the lay of the land.
- Ask for a calendar of the center's events, meetings, work shops etc., for while you are there.
- Make a rough schedule of who will interview or observe what over the time. You don't have to get everyone, remember you are coming back.

Interviews to schedule at Local Area

1. Local Executive Director
2. WIB Member
3. EDD Regional
4. Finance Manager
- 5 Data Manager

Interviews to schedule In OneStop

1. OneStop Manager
2. EDD Manager
3. Head of each Responsibility Center (Resource Room, Business Services., Case Mgt, Job Development, Placement)
4. Major co-located partner (Adult School, Voc. Rehab)
5. EDD Sub-manager, Vets, Farm Worker
6. Participants / Level of Service (ex. Questionnaire 20 participants NOTE: we need to develop this)
7. See if you could schedule a focus group of 7-11 participants

Observations

1. Map Layout:
2. Map Process: Ask to walk through like a new client.
3. Orientation Session

4. Spend time in resource room observing participants and participant staff interaction.
4. Time in labs
5. Time in classes
6. Meeting of managers – especially EDD and WIA

Documents to Collect

Essentially grab everything you can get. But some must haves:

1. All handouts, about the center and services available to clients. Marketing reveal how the OneStop presents its self.
2. Inventory Activities (ex. Monthly workshop schedules) Try to get complete documentation on activities.
3. Performance, enrollment data, that is current. If this is a local area with multiple OneStops only the local areas will have performance at the OneStop level. Sacramento data is only for the local area. So ask for this specific OneStop's performance data for 08-09 and current data if that is possible.
4. We learned in Sacto that Local EDD managers should have performance reports from CalJobs which are not available in Sacto. They would include some measures of service and outcomes, number placed etc. If you can see if they have summary report for 08-09. Also get any current reports.
5. Minutes of coop. meetings (EDD+WIA).

At the local area level see if there any documentation on the decision to become an ISD site, a WIB resolution, minutes of the meeting where the decision was made, a staff presentation to the WIB. Try and get the best history you can.

ISD Staff Interview Guide

Interviewee:_____ OneStop/ LWIA:_____

Title:_____ Organization:_____

Interviewer:_____ Date: _____

Introduction: Hello I am _____, from Cal State Northridge. We have contracted with the California Workforce Investment Board to conduct a study of the implementation of Integrated Service Delivery (ISD) in OneStops. _____OneStop is one of four case study sites. I would like to ask you some questions about your experience with ISD. Before I do I want assure you that neither you nor your OneStop will identified in any public documents. We will not use your name in any report or presentation, anything you say will be confidential. I will be taking notes but if you want me to stop taking notes at any time just ask me and I will stop. If you have any questions about the project I would be happy to answer them, or if you wish you could talk with the Project Director, Professor Richard Moore. May we continue?

1. **Would you please tell us a little bit about your role here at the OneStop?**
2. **How did you first learn about ISD?**
 - Did you participate in planning for the change to ISD?
 - How did you participate?
 - What were this OneStop's goals for ISD? (Probe here to get a clear understanding of the persons understanding of the purpose of ISD).
3. **How did the ISD implementation go from your perspective?**
 - What was your role in making the changes required by ISD?
 - What were the successes what were the problems or barriers in ISD implementation?
 - How did it change your working relationship with partners particularly WIA/ EDD?
 - How long was the implementation period?
 - Did you receive any ISD training? Please describe it?
 - How helpful was the training?
4. **How has your job changed since the implementation of ISD?**
 - The tasks you perform daily?
 - How you handle customers?
 - Your relationships with other staff?
5. **How would you compare the overall operation of your OneStop today- after ISD- with its operation before ISD was implemented?**

- How have relationships changed with partners?
 - How has the volume or quality of services delivered changed?
6. **Do you think ISD has accomplished the goals you expected it to accomplish?**
 - Probe for evidence or examples of how goals were or were not accomplished?
 7. **If you were giving advice to someone in a job like yours about considering ISD what would you tell them?**
 8. **If had our job to tell the State about how ISD implementation went, what would you tell them?**

ISD Site Administrators Interview Guide

Interviewee:_____ Agency:_____

Title:_____

Interviewer:_____ Date: _____

Introduction: Hello I am _____, from Cal State Northridge. We have contracted with the California Workforce Investment Board to conduct a study of the implementation of Integrated Service Delivery (ISD) in OneStops. _____ OneStop is one of four case study sites. I would like to ask you some questions about your experience with ISD. Before I do I want assure you that neither you nor your OneStop will identified in any public documents. We will not use your name in any report or presentation, anything you say will be confidential. I will be taking notes but if you want me to stop taking notes at any time just ask me and I will stop. If you have any questions about the project I would be happy to answer them, or if you wish you could talk with the Project Director, Professor Richard Moore. May we continue?

1. **Would you please tell us a little bit about the history of your agency, its mission?** (For local areas get the WIA back story, For OneStop Operators the agency's background with WIA/ JTPA and OneStop operation.)
2. **Would you describe the situation that lead up to your local areas decision to become an ISD site?** (Goal here is to get the story of the decision and the roles different stakeholders played)
 - How did you initially envision ISD?
 - What were the goals of the ISD initiative?
 - Who lead the initiative? Whose energy drove it
 - What role did the WIB play?
 - Who else was involved in their decision and what were their views?
 - How did the staff of the OneStop view the decision? What was their initial response?
3. **What were the goals you had for implementing ISD? What did you want to accomplish?** (NOTE: There seems to be a lot of confusion about the purpose of ISD. The most common response is "to enroll more people in WIA". We want to know if there were local goals)

To what degree have these goals been accomplished?
(Probe for concrete evidence we can measure)

4. **How would you describe the ISD model, as it is implemented here?**
 - What do you see as major strengths?
 - What are its limits?

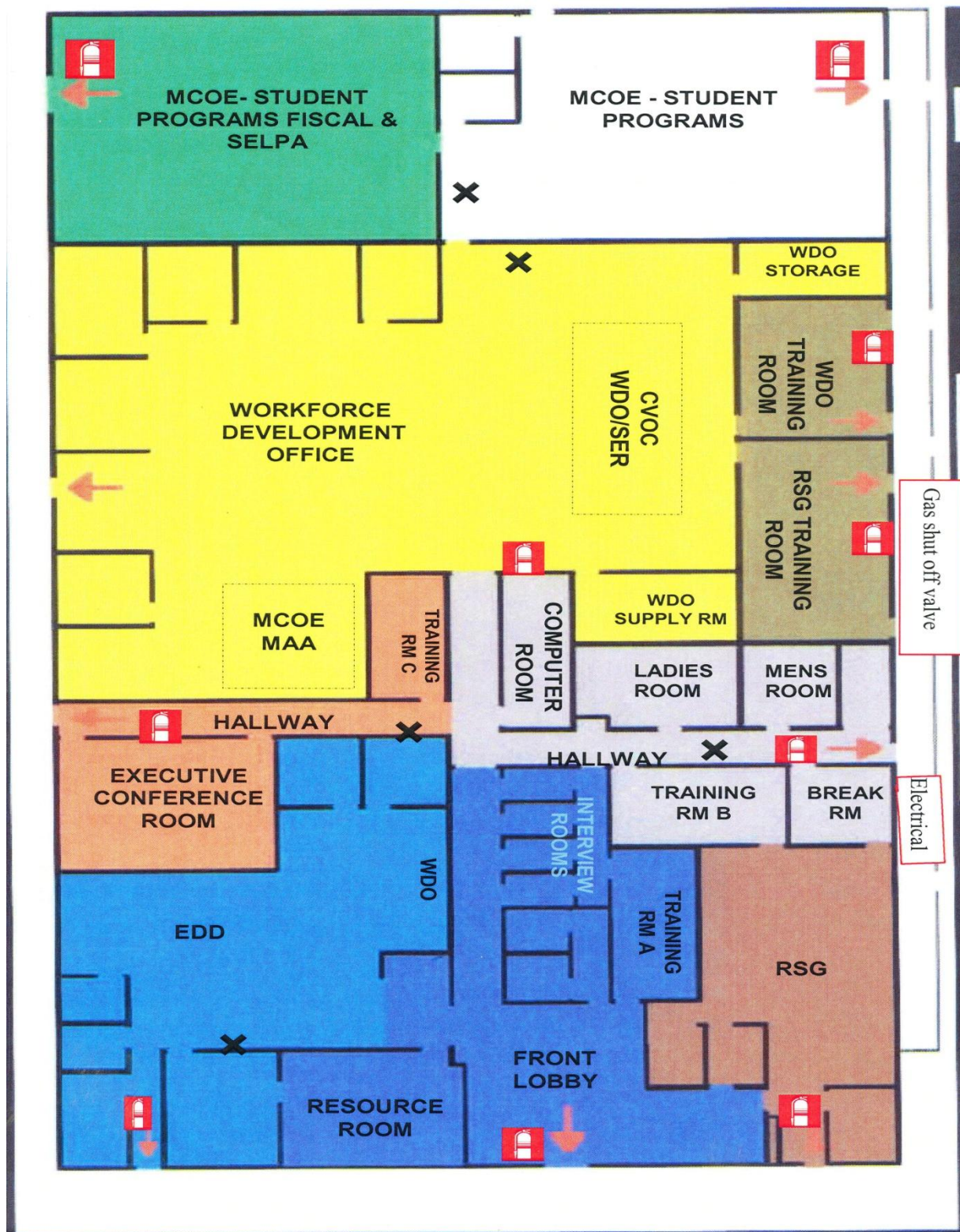
- Do some customers resist registering? How do you handle that?
- Do you actually register everyone in both WIA and EDD programs? If so how do you get people to comply with the paper work? What about undocumented workers?

5. Would you describe the process of implementing ISD here?

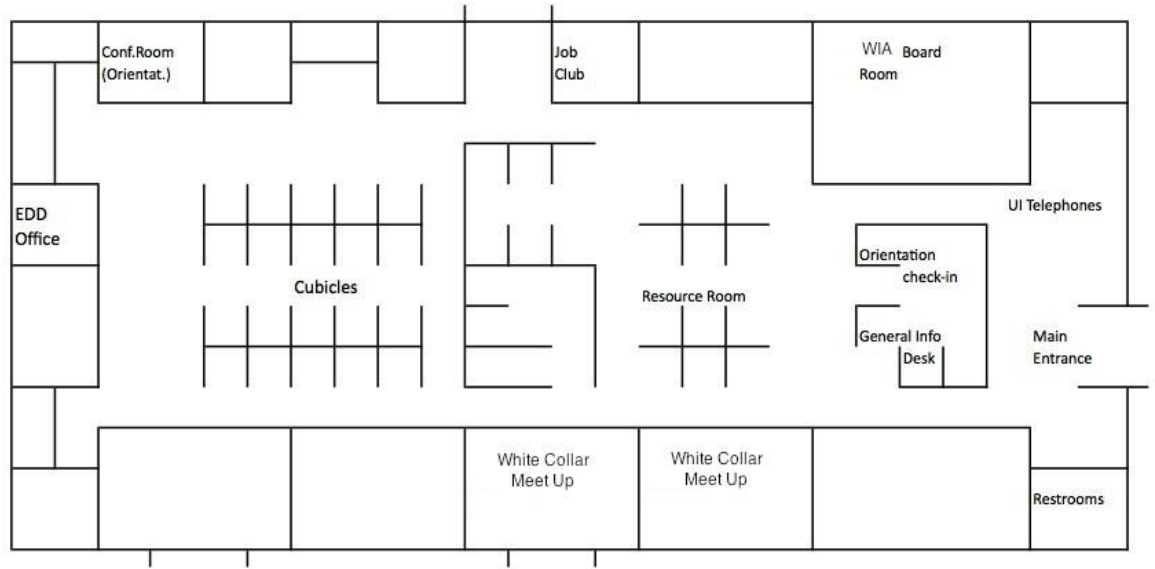
Probes:

- How was the idea introduced to the staff?
 - What as your relationship with EDD or WIA like before you were an ISD site.
 - What training if any did your leadership go through on the ISD implementation?
 - What barriers did you encounter and how did you overcome them.
- 6. We know there major data processing challenges for all the people you registered. Could you describe the data system you use and how you were able manage all the data issues?**
- 7. During implementation was types of support and direction did you get from the State from either WIA or EDD?**
- 8. How would you compare the operation of your OneStop today- after ISD- with its operation before ISD was implemented?**
- How have relationships changed with partners?
 - How has the volume or quality of services delivered changed?
- 9. If you were giving advice to a OneStop or Local Area Manger considering ISD what would you tell them?**
- 10. What do you think the State could do to improve the ISD Model?**
- 11. What do you think the State could do to improve the implementation of the ISD Model?**

CVRural - OneStop Layout



ALPHA OneStop Layout



ALPHA Workshop Handout

ALPHA Workshops

Getting Started	Focus	Resume / Applications	Job Search	Interviewing/Negotiations
<p>Career Advising Career Advisors are available to meet with you for one-on-one job search assistance. Advisors are available daily. To speak with a Career Advisor, contact the CONNECT! Front desk.</p> <p>Managing Change An interactive workshop to help you move through the stress and uncertainty created by job loss. Learn how to work through your emotions, launch an effective job search, and explore what's next for you.</p> <p>Planning Your Job Search Job searching can be overwhelming. Learn how to create an effective plan to keep you focused and on the right track to your next job.</p> <p>Real-Time Networking Practice your networking skills and grow your network at the same time. Meet with other job seekers to network in small groups and ask for advice, information and referrals.</p> <p>CONNECT! Library Orientation Learn about CONNECT! Library resources and services. Tour the library and see a demo of business databases that are available to assist you with your career and business research.</p>	<p>Discover You Interactive workshop to help you explore your interests, values and brainstorm career options.</p> <p>Who Am I? A survey of available career assessment tools to help individuals define their skills, interests, values, and personality and then apply this information to career decisions.</p> <p>Career Assessment Take career assessment tools to identify your skills, interests, values and personality. Then participate in an interactive workshop to interpret the results. Talk to a career advisor for more information.</p> <p>Career Exploration Learn how to gather information about career options, develop an understanding of how to access the latest career information resources, and discover the value of career exploration in making smart and informed career decisions.</p>	<p>Resume Facts Learn the answers to the most common resume questions including: what goes on the resume, do I need to customize my resume, what are the best ways to organize my information and is a cover letter necessary?</p> <p>Resume Critique Have a career advisor review your resume and provide you with information, ideas, and assistance in creating your resume. This service is offered during career advising appointments.</p> <p>Job Applications If your job search includes filling out applications, and most jobs do at some point, learn how to <i>not screen yourself out</i>. Discover how to successfully address legal issues and sticky questions.</p>	<p>How To Find Job Leads The more exposure you and your resume have during the job search, the more likely you are to find a job. Come learn different ways to get known by people with the power to hire you.</p> <p>Networking What is networking? How do I introduce myself? How do I start and stop conversations? Come learn all of this and how to make attending networking events an effective job search tool.</p> <p>Using LinkedIn 1 Learn the basics of LinkedIn including how to set up your profile and manage your account settings, add and remove connections and work with your inbox.</p> <p>Using LinkedIn 2 Learn how to use LinkedIn as a job search tool including finding people, using groups, finding job postings, researching companies, using LinkedIn to prepare for interviews and understanding how employers are using LinkedIn.</p> <p>Informational Interviewing Build your confidence requesting and conducting informational meetings with people who have the advice, information, referrals and possible job leads that you need.</p>	<p>Ace the Interview The most simple interview questions can be the most difficult to answer. Learn how to handle questions about your salary requirements, your weaknesses, and your strengths. Discover effective, proven techniques to prepare you for tough job interviews.</p> <p>Ace the Interview is strongly recommended before taking the following workshops:</p> <p>Interview Practice Practice your interviewing skills with a partner. Each session will cover questions related to a specific interview tool: Summary, PSR, Sandwich, or Salary Screen.</p> <p>Presenting Accomplishments Add impact to your interviews by learning how to talk about your successes, highlight your strengths and minimize your weaknesses by turning negatives into positives.</p> <p>Behavior-based Interviewing "Tell me about a time when..." Prepare for tough questions asking how you handled specific situations in your past, including both successes and failures. Create your own job profile and practice responding to related questions.</p> <p>Negotiating the Offer Discover what, other than money, is negotiable. How should you position yourself? What do you ask for first? Can you get a sign-on bonus? Get these questions answered, and practice negotiating with a partner.</p>

ALPHA Workshop Handout

ALPHA Workshops

PEP (Professional Effectiveness Program)	Computer Skills	Program Specific Orientations	Business / Financial Services	Disability Services
<p>Must be able to attend all sessions of the class.</p> <p>Communicating Learn and practice communication skills that will help you stay calm in conflict, resolve problems respectfully, present your viewpoint and listen to others.</p> <p>Team Building Learn how to handle challenging team behaviors, how to organize any team, and how to have more effective meetings.</p> <p>Problem Solving Learn and practice using clear problem solving steps to analyze and creatively solve problems. It is recommended to take either Communicating or Team Building prior to Problem Solving.</p>	<p>Must be able to attend all sessions of the class.</p> <p>Intro to Computers Overview of the computer and introduction to MS Word. Topics covered include saving and retrieving files, creating, editing and formatting a document.</p> <p>MS Office classes are introductions to the Microsoft applications. It is recommended that participants be comfortable with basic computer functions.</p> <p>MS Word Editing, formatting templates, wizards, layouts, graphics, columns, and tables.</p> <p>MS Excel Editing, formatting, printing, charts, and basic calculations.</p> <p>MS PowerPoint Creating a presentation, adding / modifying slides and templates, inserting information, and printing slides.</p> <p>Intro to Access Understanding databases, creating tables, creating and using Queries, and designing forms and reports.</p>	<p>Promatch Orientation Learn about Promatch, a member-driven networking organization that provides connections and resources for professionals engaged in job search.</p> <p>Dept Of Rehabilitation Orientation An overview of the services offered by California Department of Rehabilitation and how to apply for services. Please sign up at the CONNECT! front desk.</p>	<p>Should I Start A Business Learn the fundamentals of what it means to run your own business and local resources available to assist entrepreneurs.</p> <p>Franchise Options How to start a franchise and local resources available to assist entrepreneurs.</p> <p>Mastering Your Money Review the basics of a spending plan and the ins and outs of credit.</p>	<p>Disability Navigator The Disability Navigator can provide guidance on benefit issues, disability disclosure, workplace accommodations, legal issues, and other programs and community-based organizations that can help leverage the job search of individuals with disabilities. Please see the front desk to schedule an appointment.</p> <p>Dept Of Rehabilitation Orientation An overview of the services offered by California Department of Rehabilitation and how to apply for services. Please sign up at the CONNECT! front desk.</p> <p>Community Work Incentive Coordinator If you have questions about working and collecting SSI or SSDI please call the Silicon Valley Independent Living Center at 408-894-9041 and ask to talk to the CWIC.</p>